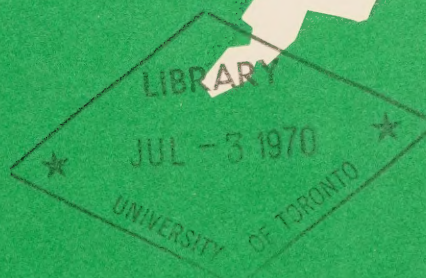
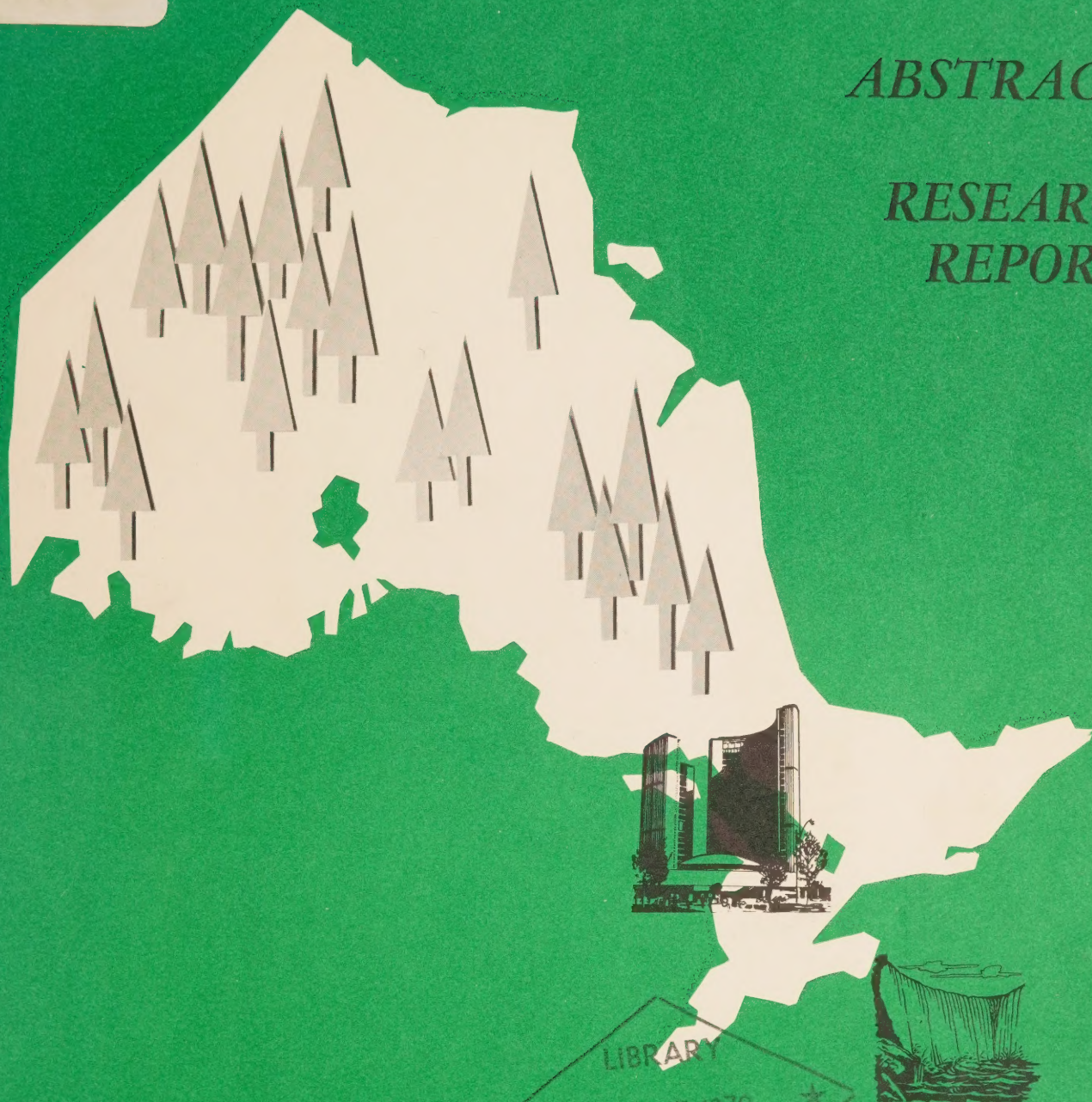


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Travel Research Reports - Abstracts

A
Compilation
of
ABSTRACTS
of
RESEARCH
REPORTS



THE ONTARIO DEPARTMENT OF TOURISM AND INFORMATION
Hon. James Auld, Minister

A. S. Bray, Deputy Minister

Travel Research Branch



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VOLUME I

ABSTRACTS
OF
TRAVEL RESEARCH BRANCH
REPORTS
1964 to 1969

Travel Research Branch

Director, Peter Klopchic, Ph.D.

The Ontario Department of Tourism and Information

Parliament Buildings

Toronto, Ontario

MAY, 1970

A STUDY OF VISITORS WHO TRAVELLED BY AUTOMOBILE TO ATIKOKAN, ONTARIO

JUNE 13th TO OCTOBER 12th, 1964

Purpose: To measure and determine the popularity of the northwest town of Atikokan, to discover its assets and deficiencies as a tourist plant providing evidence for possible improvements.

Observations: Visitors to Atikokan proved significant in both number and origin. Within the allotted time-period, Atikokan was visited by approximately 35,000 persons — an average vehicle containing between two to four persons — from areas outside a 50-mile radius of the town. The majority of visitors (70%) originated in Ontario; 19 per cent were from the Prairie provinces and 10 per cent had their place of origin in the United States.

Visitors were mainly adults, thirty-five years of age or older. Almost all parties (96%) contained adult men; 60 per cent contained adult women and about 40 per cent contained teenagers and/or children twelve years of age and under.

Of the respondents, 32 per cent were skilled labourers, 26 per cent were of the professional and managerial categories, and 24 per cent were sales and clerical personnel.

In general, Atikokan attracted not the family vacationer of a permanent nature, but the transient segment of the tourist market. Of the respondents, 31 per cent stayed less than

one day, 12 per cent stayed one night, 30 per cent stayed two to four nights, and 12 per cent stayed more than 10 nights.

Most respondents had a specific reason for visiting Atikokan. Business reasons were given by 34 per cent of the respondents; 23 per cent gave visiting friends and relatives. Fishing, sightseeing, just vacationing and personal and family affairs were among the primary reasons given for visiting the town. The majority of respondents (82%) stated they would like to return to Atikokan again; this desire was not as prevalent among business travellers, or users of hotels, motels and holiday resorts.

By combining the "fair", "poor" and "terrible" ratings of the five-point adjectival scale, a "total negative rating" of the town and its services was produced. Entertainment facilities, roads, and local prices of goods and services were very poorly rated. However, the congenial attitude of the local people towards visitors received favourable mention.

Recommendations: With the construction of a new highway to Fort Frances, Atikokan will experience a greater influx of visitors of the transient nature. In preparation, the town should improve the quality of the services and facilities and advertise its role as a part of the Rainy River vacation area.

Prepared By: McDonald Research Limited, Toronto

Published By: Ontario Department of Tourism and Information

Date: 1964

Note: LIMITED EDITION

Available on loan by arrangement with Travel Research Branch

A STUDY AMONG VISITORS TO ELLIOT LAKE, ONTARIO

JUNE 15th TO SEPTEMBER 15th, 1964

Purpose: To determine the volume, origin and intra-seasonal pattern of visitors to Elliot Lake; their attitude towards the town's services and attractions in order to discover its deficiencies and provide a basis for possible improvements.

Observations and Recommendations: The town of Elliot Lake is situated approximately 25 miles from the main through-highway. Nevertheless, the town attracted a significant volume of visitors. About 28,500 passenger vehicles, from outside a 50-mile radius of the town, made a visit to Elliot Lake within this three-month period. Of these visitors, 82.3 per cent were residents of Ontario; visitors from the U.S. accounted for 10.5 per cent of all respondents.

However, after driving 25 miles "out of their way", the large incidence of persons who remained in the town for less than one day (56.1%) stands as an initial measure of defeat for tourism in Elliot Lake. American visitors proved least eager of all respondents to stay in the Elliot Lake area. The high incidence of extremely short visits to Elliot Lake has undoubtedly depressed the incidence of use of the town's services. It is fairly evident what the benefits of encouraging longer visits would accrue.

A majority of visitors just "dropped in" to see the town. Of the respondents, 58 per cent gave sightseeing and "just vacationing" as a primary reason for visiting Elliot Lake; 27 per cent gave visiting friends and relatives, and personal and family affairs; 12 per cent gave business reasons.

Business travellers, to a greater degree than others, utilized restaurants, commercial accommodation and entertainment facilities. Local retail outlets, such as food and drug stores, were primarily used by campers and other visitors.

Favourable comments made by visitors generally note that Elliot Lake is a clean, tidy town in a beautiful setting. The Nuclear Museum and the mining complex proved to be the two major elements of appeal to tourists. Still, a total negative rating of the town's services was obtained. Its key shortcoming, as reported by respondents, was a serious lack of entertainment, or "things to do", followed by criticisms concerning restaurant food and services, beverage rooms, and the state of local accommodation of all types. The ghost-town appearance of boarded-up homes repelled many visitors. Improvements must be made in these, as well as other areas, in order to maintain the attractiveness of Elliot Lake as a tourist plant.

Prepared By: McDonald Research Limited, Toronto

Published By: Ontario Department of Tourism and Information

Date: 1964

Note: LIMITED EDITION

Available on loan by arrangement with Travel Research Branch

MEDIA INFLUENCES AND ATTITUDES TOWARD TRAVEL TO ONTARIO

A U.S. VISITOR STUDY

Purpose: To explore the most efficient placement for print advertising within United States publications; to explore the appeal of Ontario as a vacation destination.

Observations and Recommendations: This motivational survey, based on the quota sample, provides information on the purchase and subscription, readership and emotional involvement, and image of different magazines.

The image of unspoiled nature and the opportunity to escape civilization and its pressures attracted American vacationers to Ontario. The male vacationer proved adventurous in character while the female was self-denying and self-controlled. Male vacationers to Ontario read more magazines and a greater variety of magazines than male non-vacationers. The opposite was true for the female population.

American non-vacationers to Ontario were rather poorly informed about Ontario as a vacation destination, picturing the province as a big empty space with commonplace cities. Non-vacationers tended to be security oriented in character. The present peripheral

image of quaint towns, scenic attractions, exhibitions and festivals must be developed and advertised, along with the availability of tourist services and accommodation, to attract this sector of the American population.

Distance was also a factor. Visitors outside a 300-mile radius had practical reasons - such as business, visiting friends or relatives - for travelling to Ontario. A majority of respondents within the 300-mile radius travelled to Ontario primarily to vacation. Thus, it was concluded that regional editions represented the most efficient media for the bulk of Ontario advertising.

The influence of media on a respondent's decision to visit Ontario helped confirm other influences, such as the recommendations of friends or relatives and the respondent's own personal knowledge of Ontario. Magazines proved successful in providing information covering general areas in Ontario; newspapers helped in the selection of specifics, such as commercial accommodation. Because the recall of advertisements was poor, more specific information on sporting areas, special events and accommodation is required.

Prepared By: Marplan, Division of Communications Affiliates Inc.

Published By: Ontario Department of Tourism and Information

Date: August, 1964

Note: LIMITED EDITION

Available on loan by arrangement with Travel Research Branch

AN ANALYSIS OF THE MUSKOKA REGION TRAVEL SURVEY

SEPTEMBER 15th TO OCTOBER 15th, 1964

Purpose: Salient points touched by "A Study of Visitors who Travelled by Automobile to the Muskoka Region of Ontario", conducted by McDonald Research, are brought out in this analysis. The analysis reveals the impact and value of tourism in the Muskoka region of Ontario; discloses the deficiencies of the Muskoka tourist plant and suggests means of improvement.

Observations and Recommendations: The tourist industry was the prime generator of employment in the Muskoka area in 1964. During that year, the total tourist expenditure alone amounted to approximately \$47.5 million in contrast to the approximate \$25 million spent by local residents in that year.

A most important segment of the tourist industry was cottagers who accounted for 36 per cent of all expenditures made by tourists.

Since cottagers are also the most permanent and reliable customers of that area, this type of tourist should be cultivated.

Service stations, hotel and motel accommodation, the quality of restaurant food and services, as well as the attitude of the local people towards visitors were all very highly rated by respondents. There is some need for improvement as regards local prices, beverage rooms and the quality of entertainment; these received a low rating.

Advertising, it was found, serves not only as an effective information-giving device, but also acts as a reminder to tourists of attractions and events taking place in Ontario. Even though many of these are well-known successful ventures, they should, nevertheless be advertised again and again.

Prepared By: Peter Klopchic, Ph.D.
Director, Travel Research Branch

Published By: Ontario Department of Tourism and Information

Date: September, 1965

AN ANALYSIS OF THE TRAVEL HABITS AND EXPENDITURES OF METROPOLITAN TORONTO HOUSEHOLDS

APRIL 1964 TO APRIL 1965

Purpose: On the basis of information obtained in a study, conducted by McDonald Research on behalf of the Ontario Department of Tourism and Information, a subsequent analysis of the travel habits and expenditures of Metropolitan Toronto households was made. The analysis summarizes a number of facts revealed by the study, compares resultant statistical tables, and adds other known data bringing to light a number of aspects on the motivation, expenditures, and travel habits of Torontonians which otherwise would appear most complicated.

Observations: Between April 1964 and April 1965, Metropolitan Toronto households made well over six million trips (the average annual number of trips per household being 12.3) and spent approximately \$270 million on travel.

Ninety per cent of all trips were directed to Ontario but only 45.4 per cent of the total expenditure was spent in Ontario; 20.8 per cent was spent in the U.S.; 17.5 per cent was spent in other Canadian provinces and 10.8 per cent was spent in Europe.

Expenditures in Ontario were considerably higher during the summer period. Business trips were considerably more expensive than non-business trips.

Torontonians proved to be veritable travellers having a high incidence of trips occurring outside of Canada. The intensity of this kind of travel was highest in the winter months.

The passenger car was the main mode of transportation. Non-business trips were most usually family affairs for reasons of family, friend's and personal affairs (52.6%), and outdoor recreation and activities (37.9%).

As would be expected, 55.7 per cent of the accommodation used on non-business trips were the homes or cottages of friends or relatives; 26.7 per cent of the respondents owned or rented a cottage or cabin. Where accommodation was required on business trips, 74.6 per cent of the respondents utilized commercial hotels or motels.

Torontonians who travelled most frequently were found to be better educated, have a more than average income, owned a car and a home as well as other possessions such as cottages and boats. They were more frequent subscribers to The Globe and Mail, and other leading Canadian and American periodicals.

Recommendations: To induce a greater number of Torontonians to travel in their own province, the Ontario tourist plant should develop tourist towns and provide increased entertainment facilities in their vicinity; promote cottage development; develop Ontario waterways, such as the Trent and Rideau Canals and the Great Lakes system for pleasure boating tourists; step-up promotion in Ontario of Ontario as a vacationland.

Prepared By: Peter Klopchic, Ph.D.
Director, Travel Research Branch

Published By: Ontario Department of Tourism and Information

Date: March, 1966

A SHORT ECONOMIC EVALUATION OF TOURIST BOATING ON THE TRENT CANAL

Purpose: This report was prepared at the request of the Federal Department of Transport to show the present use and economic activity created by pleasure craft on the Trent Canal.

Observations: Although only one-quarter of its capacity has been reached, the Trent Canal has already created a sizeable economic activity. The increase in the number of boats using the canal over a 10-year period was as follows:

<u>Year</u>	<u>Boats</u>	<u>Per Cent</u>
1956	2,700	100.0%
1965	10,600	392.6%

In 1965, the average expenditure per boat was \$354; the total expenditure by boats would, therefore, amount to \$3.8 million. If maintenance and operating costs of the canal are added to this sum, a total of \$4.7 million was spent in this area. In consideration of Ontario's economic multiplier (two), approximately \$2.5 million in revenue was generated for all three levels of government — Municipal, Provincial and Federal.

When, after a few improvements, the total capacity of the canal of 40,000 boats per year is reached, it is expected that the Federal Department of Transport and the boating tourist will spend \$20 million per year, creating an economic activity of \$40 million, and generating approximately \$10 million in revenue for all three levels of government.

Recommendations: The lamprey problem must be evaluated and solved.

The replacement of the Big Chute marine railway with a lock capable of accommodating larger craft will most certainly increase the number of Canadian and American pleasure boats using the canal.

It is in the interests of the Municipal, Provincial and Federal Governments to develop and promote the maximum use of the canal as early as possible in order to create additional economic activity and generate an increase in the volume of revenue.

Prepared By: Peter Klopchic, Ph.D.
Director, Travel Research Branch

Published By: Ontario Department of Tourism and Information

Date: March, 1966

CANAL ON THE OTTAWA RIVER — A SHORT ECONOMIC EVALUATION

Purpose: To estimate the cost of a canal on the Ottawa River, the number of potential users, and the impact of their spending on the economy of adjacent areas.

Observations: The cost of a complete canal from the Ottawa River, via Mattawa and Lake Nipissing, to the Georgian Bay would run in the neighbourhood of \$253.8 million. Since it is anticipated that the over-all industrial use of the canal would be very small, the use of the canal by tourists would, in all probability, be the only source of revenue for some time.

The number of boat-users and their expenditure was estimated as follows:

	First Alternative		Second Alternative	
	No. of Boats	Expenditure in Millions	No. of Boats	Expenditure in Millions
After				
First year	5,000	\$ 2.0	5,000	\$ 2.0
20th year	80,000	32.0	-	-
30th year	-	-	79,300	31.7

If the tourist appeal of the Ottawa Canal proves to be equal to that of the Trent Canal, the canal (based on Ontario's economic multiplier of two) may well generate an economic activity of \$64 million after a period of 20 to 30 years.

Recommendations: In order for its construction to be advantageous, the Ottawa-Georgian Bay Canal might be built to coincide with the saturation point of the Trent Canal. Only one-quarter of the maximum boating capacity of the Trent Canal is now being utilized; approximately the same may be said of the Rideau Canal. It would not be advisable, therefore, to build a canal for pleasure craft on the Ottawa River until the maximum boating capacity of the Trent and Rideau Canals is reached. When this does occur, the project may then be taken into serious consideration.

Prepared By: Peter Klopchic, Ph.D.
Director, Travel Research Branch

Published By: Ontario Department of Tourism and Information

Date: March, 1966

ANALYSIS OF SURVEY OF MOTEL OCCUPANCY IN ONTARIO

NOVEMBER 1964 TO OCTOBER 1965

Purpose: To obtain statistical information on the occupancy of motels throughout a 12-month period in the 32 vacation areas of the province. Particular attention was paid to motel occupancy on weekdays in comparison to motel occupancy on weekends.

The study should prove a helpful guide to both present and potential entrepreneurs.

Observations: There was a high degree of uniformity in motel occupancy throughout all six tourist regions. The average yearly occupancy for motels in all vacation areas in Ontario was 60.21 per cent. Significantly, 18 of the 31 vacation areas having motels had an occupancy average which was very close to the provincial average.

The month of August had the highest average occupancy for all six tourist regions (88.95%); December had the lowest (34.67%). The greatest variation between the summer and winter months was observed in the northwest tourist region; the least variation occurred in the southwest tourist region.

Motel occupancy on weekends was consistently lower than occupancy on weekdays. Factors involved lay in the structure of the accommodation market. The business traveller who relies mainly on commercial accommodation, such as motels or hotels, usually travels on the weekday. Hence, the occupancy is higher on the weekday. The non-business traveller is usually a tourist travelling during the weekend who relies mainly on accommodation owned either by himself (such as a cottage or a cabin), or by friends or relatives. Hence, motel occupancy is lower on weekends.

Differences in motel occupancy between weekend and weekdays were also greater during the winter and spring. During the summer months, differences in the two occupancies were less.

Recommendations: Additional promotion to attract weekend guests should be devised by motel entrepreneurs. By offering lower rates during weekends or other specified off-periods, and by offering a greater variety of services and amenities, greater use of motels on weekends could be achieved.

Prepared By: Peter Klopchic, Ph.D.
Director, Travel Research Branch

Published By: Ontario Department of Tourism and Information

Date: May, 1966

TOURIST ESTABLISHMENT OCCUPANCY IN ONTARIO BY TOURIST REGION

JUNE AND JULY, 1966

Purpose: To calculate the average total occupancy of all types of tourist establishments in Ontario by type of establishment and by va-

cation area during the months of June and July, 1966.

Observations:

Summary of Average Total Occupancy of All Ontario Tourist Establishments by Type of Establishment, June and July, 1966 — In Per Cent

Month	Total for Ontario All Types of Establishments	Hotel Motor Hotel (LLB)	and	Hotel (Not LLB)	Motel	Lodge	Cottage	Cabin	Campsite	Other
June	50%			58	52	49	40	33	71	20
July	69%			69	76	61	76	53	81	59

	June	July
Establishments Selected for Sample	713	770
Correct Responses Received and Tabulated	458	529
Correct Responses (In Per Cent of Selected Sample)	64%	69%

Prepared By: Travel Research Branch
Director, Peter Klopchic, Ph.D.

Published By: Ontario Department of Tourism and Information

Date: September, 1966

Note: Continuous Study, FILE COPIES ONLY
Available on loan by arrangement with Travel Research Branch
Data updated to Report No. 22
"Tourist Establishment Occupancy in Ontario by Tourist Region
July and August, 1967

ANALYSIS OF THE STUDY OF THE SUDBURY TOURIST REGION

THE OPINIONS OF ITS VISITORS; THE PERFORMANCE OF ITS TOURIST PLANT

JULY 1st TO SEPTEMBER 1st, 1965

Purpose: On the basis of information obtained from a survey designed by McDonald Research for the Department of Tourism and Information, a subsequent analysis, revealing the impact and the value of tourism to the Sudbury tourist plant, was made. The origin and volume of visitors, and their party characteristics are measured; the performance of the Sudbury tourist plant is analysed and the means of improving any deficiencies observed are brought out in the analysis.

Observations and Recommendations: Although Sudbury, because of its excellent geographical position, had a great number of visitors, it was unable to retain any majority for very long. The primary reason given by respondents for being in the area, that of "visiting while passing through", partly explains the short length of stay. The Big Nickel proved to be by far the best tourist attraction in and around Sudbury; however, 40 per cent of the respondents did not mention any attractions visited. This could reflect either the short stay of a large proportion of tourists or the lack of any great sightseeing "pull" of attractions in the area. Obviously, some effort should be made to motivate, persuade or "hold" people in the area for a longer period of time.

During the 1965 summer season, 73 per cent of all tourist automobiles in the Sudbury tourist region came from within the Province of Ontario. Of these, 54 per cent had their place of origin in the Golden Horseshoe (in and around Metropolitan Toronto) area. However, U.S. visitors comprised the bulk of patrons utilizing the "for hire" type of commercial facilities. Advertising should be focused where these visitors originate, principally in Michigan, Ohio, New York and Pennsylvania. Careful attention should be given to their vacation requirements and the type of facilities and entertainment they prefer.

Owners of camps, cabins, cottages or other dwellings in the Sudbury area had the longest average length of stay and the highest expenditures per party. Cottage development should be planned and promoted extensively to take advantage of this prime and constant source of tourist dollars.

People utilizing accommodations in the area generally rated them good to excellent. Recreational facilities, fishing and retail outlets were rated very low. Possibilities for improvement should be investigated and implemented.

Prepared By: Peter Klopchic, Ph.D.
Director, Travel Research Branch

Published By: Ontario Department of Tourism and Information

Date: September, 1966

DATA ON THE TRAVEL PATTERNS, ORIGINS AND DESTINATIONS OF AMERICAN AND CANADIAN (INCLUDING ONTARIAN) VISITORS TO ONTARIO GOVERNMENT RECEPTION CENTRES — 1965

Purpose: To obtain basic marketing data on visitors to the Province of Ontario, their origin, their primary reason for visiting, their travel patterns and their method of travel, the type of accommodation used and the type of recreation enjoyed during their stay in Ontario.

Observations: As the visitor to any one of Ontario's Government Reception Centres is representative to some extent of the average tourist to Ontario, a cross section of these visitors was sampled. Information obtained will enable each tourist region to focus its advertising on the market from which its visitors originate, and intensify development of those attractions in greatest demand. Secured data shows tourist promotion agencies in each vacation area, the locations of their major tourist-prospects and the direction of their advertising and promotion. The report also indicates the tourist attract-

ions which receive the most interest from visitors and those which require additional development or promotion in order to attract new visitors.

The primary destinations of the "average" tourist were (in their order of magnitude) as follows:

- Niagara-Iroquoia (1)
- Seaway Valley (2)
- Essex-Kent (3)
- Rideau Lakes — 1,000 Islands (4)
- Algoma (5)
- Metropolitan (6)

Additional basic marketing data for each of the 32 vacation areas is provided in the report.

Prepared By: Travel Research Branch
Director, Peter Klopchic, Ph.D.

Published By: Ontario Department of Tourism and Information

Date: September, 1966

Note: FILE COPIES ONLY

Available on loan by arrangement with Travel Research Branch

Data updated to Report No. 37

"Visitors to Ontario Government Reception Centres

Part I - Summary, All Ontario

Part II - By Ontario Vacation Areas, 1965 to 1967"

U.S. TOURIST SURVEY, 1966

A STUDY CONDUCTED ON BEHALF OF THE DEPARTMENT OF TOURISM AND INFORMATION

Purpose: To find out the basic motivation of American tourists to travel to Ontario; what time of year their decision was made; and the enjoyable or disliked aspects of their vacation in Ontario.

Observations: For the American visitor to our province, Ontario appears to be primarily a place for family vacations. "Touring the province" headed the main list of activities of U.S. visitors to Ontario followed by visiting historic sites, relaxing, fishing, visiting provincial parks and visiting cities. "Friends" were the initial factor drawing respondents' interest in visiting Ontario. Respondents staying in Ontario for less than three days were either visiting areas close to the border such as Niagara Falls or simply passing through to a destination other than Ontario; respondents with a more genuine interest in a visit to Ontario spent from three days to one week in the province.

The summer vacation months of July and August were the months chosen for visiting

Ontario. A good percentage of individuals, it was discovered, planned their visit to Ontario only a short time before their actual vacation date. Since a significant number of respondents spent only a few days in the province, there would be no need for too much preparation as far as money or activities were concerned.

Motels headed the accommodation list followed by provincial camps, the popularity of which is worth noting.

Part B

Vacation Planning

Because of considerations of time, expense and availability of staff, it was concluded that persons living in an area such as Don Mills, Toronto, were comparable to their American counterparts living in similar urban areas. Thus, inferences to some of the factors influencing vacation planning of Americans were made.

Prepared By: Ontario Civil Service Commission
Personnel Research Branch
Director, S. D. Saleh, Ph.D.

Published By: Ontario Department of Tourism and Information

Date: September, 1966

STATISTICAL HANDBOOK, 1966

Purpose: The 1966 Statistical Handbook was prepared, in booklet format, in order to summarize the most frequently requested statistical data available regarding visitors to Ontario, and the Ontario tourist industry in general. Thus, uniform statistics on the province's tourist plant are available for purposes required by both public and private organizations.

Contents: The Statistical Handbook is NOT a research project. It is simply a summary of all existing valid data on the province's tourist industry. Fields that were covered are as follows:

1. An estimate of the total expenditures made by tourists in Ontario, and Canada.
2. (a) The number of tourists visiting Ontario, their place of origin, and their mode of travel.

(b) The number of visitors to Ontario Government Reception Centres.
3. (a) The number of provincial parks in Ontario and their number of visitors.

(b) Attendance figures for the selected sites of Fort Henry and Upper Canada Village.

(c) Attendance figures at various park facilities presented by the Niagara Parks Commission.

4. Detailed statistics on the main aspects of tourist establishments in Ontario.
5. A comparison of Ontario's promotional expenditures with actual foreign tourist expenditures in the province. Ontario's publications and advertising expenditures are also compared with promotional expenditures made by the Province of Quebec, Canada (all provinces combined) and those made by the Canadian Government Travel Bureau.
6. Statistics on pleasure boating in Ontario.
7. A summary of data obtained from the Muskoka Region Survey and a summary of selected travel characteristics of trips originating in the Metropolitan Toronto area is also provided.

Prepared By: Travel Research Branch
Director, Peter Klopchic, Ph.D.

Published By: Ontario Department of Tourism and Information

Date: October, 1966

Note: Data updated to Report No. 30
"Statistical Handbook, 1968"

REPORT ON SKIERS, 1966

An Analysis of a Sampling of Skiers Taken at Four Ski Resorts in Ontario

DECEMBER 1965 TO APRIL 1966

Purpose: To obtain information on the scope, size and characteristics of the skier market in Ontario.

Observations: Winter skiing in Ontario is relatively a new mode of recreation and it is developing rapidly. It is estimated that the number of skiers in Ontario ranges between 100,000 to 120,000 persons, and there is no indication that the sport has, as yet reached its peak.

The majority of skiers originated in Metropolitan Toronto; the percentage of population of skiers originating in Metro Toronto did not vary from one resort to another. Skiers tended to be young—between twenty-five and thirty years of age—males who earned an average income of \$6,450. The income of married skiers was considerably higher. Almost two-thirds of the skiers sampled belonged to either the professional, student or managerial occupations. Although two-thirds of the skier population was male, the ratio of males to females was fairly uniform in the four resorts sampled.

On the average, the Ontario skier visited between two to three ski areas in the province, skied 20.4 days in each ski season and spent \$11.16 per day. They travelled mainly by car and the majority required overnight accommodation.

The incidence of ski club membership was higher in the high income groupings; how-

ever, the incidence of skiers purchasing tickets by the day was highest in the lower income groupings.

Skiers taking a ski vacation had, on the average, a higher income than those who did not. The Province of Quebec was selected as the location for a ski vacation by 37.8 per cent of the respondents questioned; 26 per cent selected Ontario and 20.9 per cent selected destinations in the United States.

Recommendations: Since the percentage of Torontonians was highest at the ski resort closest to Toronto, the ski industry in Central Ontario should concentrate its ski promotion and advertising in the Metropolitan Toronto area.

Après ski facilities were rated lower than satisfactory. As the majority of skiers stated après ski facilities could be improved, ski resorts should consider the planning and development of recreation rooms, dancing facilities, lounges and other services.

Approximately two-thirds of the skiers required overnight accommodation. Lodges were most frequently used followed by motels, cottages and hotels. As overnight accommodation is required in the majority of cases, ski resorts should consider the possibility of expanding into this field.

Prepared By: Peter Klopchic, Ph.D.
Director, Travel Research Branch

Published By: Ontario Department of Tourism and Information

Date: October, 1966

A SUMMARY OF A STUDY OF ONTARIO'S MARINE HIGHWAYS IN RELATION TO RECREATIONAL BOATING REQUIREMENTS

Purpose: A summary of a consultant's report (done on behalf of the Department of Tourism and Information to examine the existing water systems and to provide an economic assessment of the recreational boating potential for Ontario suggesting guidelines for future development), this study gives the substance of their findings and assesses the problems to be faced.

Observations: The potential for the development of recreational boating requirements is extensive. It was estimated that by 1967 over two million boats would be within convenient reach of Ontario's waterways either directly by water, or by highway. In short, pleasure boating has become a mass activity and in certain areas of the province, the number of tourists cruising our waters now approaches or surpasses the number of U.S. cottagers. The recreational boating population explosion will continue into the future if facilities to serve such a growth are made available.

Recommendations: If the surface of our waters can be made available to serve this new

floating population, thousands of acres of additional parkland can be added to the province's resources for a minimum use of shoreline sites.

Ontario's inter-related lakes and rivers should be treated as a part of a system to encourage the dispersal of traffic over as wide an area as possible.

A single agency should be established by both the Federal and Provincial Governments to provide a means of co-ordinated development of the entire system. Pollution control should be improved and enforced on all Ontario waterways.

Encouragement should be given to the American tourist coming to Ontario to protract his vacation benefiting the province in greater tourist expenditures; encouragement should also be given to Ontario citizens to spend more of their vacation dollars at home rather than abroad.

Prepared By: Dominion Consultant Associates Limited, Ottawa and Toronto

Published By: Ontario Department of Tourism and Information

Date: September, 1966

ANALYSIS OF EXPECTED TRAVEL IN ONTARIO DURING EXPO '67

Estimate of Demand (as of the period April to October, 1966) for

Rental Unit Accommodation in Southeastern Ontario During Expo '67

Purpose: To estimate the demand for rental unit accommodation in Southeastern Ontario created by Canadian and American visitors to Expo.

Observations: Southeastern Ontario, it was deduced, would be able to cope with the number of visitors to Expo passing through that area of the province provided that the shortage of rental units, during the months of July, and August, was balanced by the organization of the use of acceptable private homes to cater to the overflow from commercial tourist establishments during that period.

Recommendations: Information services on oc-

cupancy levels should be organized; Regional Tourist Councils would appear to be the most suitable co-ordinating agency.

Three class ratings of private homes, according to the emergency situation, should be initiated. This could be handled by motel operators or other regional groups.

By all appearances, additional campsites will be required.

From observations of the present trend, it would appear that any construction of new rental units would be economically inadvisable.

Prepared By: Peter Klopchic, Ph.D.
Director, Travel Research Branch

Published By: Ontario Department of Tourism and Information

Date: November, 1966

Note: FILE COPIES ONLY
Available on loan by arrangement with Travel Research Branch

A SHORT ECONOMIC EVALUATION OF HUNTING AND FISHING IN ONTARIO

Purpose: To determine the extent of expenditures, made by residents and non-residents, on hunting and fishing in Ontario.

Observations: Hunting and fishing have become two very important tourist attracting elements for Ontario. In 1964, the expenditures of non-resident hunters and fishermen (the majority of whom originated in the United States) amounted to \$108.7 million. This was approximately one-quarter of the total foreign expenditure in the province.

Coincidentally and significantly, findings in our "U.S. Visitor Study" further highlight the importance of these outdoor sports to the whole Ontario tourist plant. Of our American visitors, 26 per cent gave hunting and fishing as their primary activity during their trip to Ontario.

In the opinion of Ontario's permanent visitors from the U.S. (that is, those who return) fishing was rated as the best attraction offered by Ontario as a vacation destination.

Resident hunters and anglers spent approximately \$135.4 million in Ontario in 1964.

Recommendations: Economically speaking, it would be tremendously advantageous to Canada's balance of payments if both the Federal and Provincial Governments develop and promote these two forms of outdoor recreation.

Hunting and fishing are high on the list of Ontario's attractions and should be extensively advertised in order to attract more hunters and anglers, not only in the United States but in Europe and other foreign countries as well.

Aside from the financial gains, there are many other beneficial aspects. Hunting and fishing, both healthy outdoor activities, provide the opportunity to foreign and Ontario tourists to take part in a type of recreation which uniquely brings them into close "personal" contact with Ontario's abundant, natural scenic areas.

Prepared By: Peter Klopchic, Ph.D.
Director, Travel Research Branch

Published By: Ontario Department of Tourism and Information

Date: December, 1966

FEASIBILITY STUDY OF THE MUSEUM OF THE CANADIAN FUR TRADE AT THE FRENCH RIVER

Purpose: To financially assess the cost and feasibility of constructing a museum, situated on Highway 69, dealing with the Canadian fur trade.

Observations: Economically speaking, the construction of a Museum of the Canadian Fur Trade at the French River is feasible. On the basis of similar previous studies, it was assumed that at least 10 per cent of the balance of traffic would stop at the museum. An admission fee of \$1.00 could be charged and obtained from all adult visitors.

The cost of the museum itself is expected to range around \$235,000. The estimated total annual revenue (derived from admissions, from the sale of pamphlets and other items) would amount to \$61,030. If the estimated total annual operational costs amount to \$35,000, then a gross net profit of \$26,030 could be obtained.

If a loan of \$175,000 was to be obtained from the Ontario Development Corporation, it was

estimated that a loan of this amount could be paid off within 10 years.

Recommendations: If a loan from the Ontario Development Corporation was to be obtained, it would be advisable to raise a sizeable amount of private capital locally. At least \$60,000 would have to be contributed by local residents for the initial financing of this project.

Other provisions must also be made. Construction of the museum is feasible if: at least eight to ten per cent of all passenger vehicles passing the location on Highway 69 of this proposed project, stop and visit the museum during the months of June through to September; an admission fee of \$1.00 is charged to all adult visitors. Children, of course, would be admitted free of charge.

Much caution must be exercised before embarking on this type of project as the majority of museums in the province operate at a deficit with the exception of some museums located in areas that enjoy a heavy tourist traffic.

Prepared By: Peter Klopchic, Ph.D.
Director, Travel Research Branch

Published By: Ontario Department of Tourism and Information

Date: January, 1967

Note: FILE COPIES ONLY

Available on loan by arrangement with Travel Research Branch

U.S. VISITORS STUDY

Purpose: To measure Ontario's image amongst potential U.S. visitors; to develop profiles of both visitors and non-visitors along with their attitudes towards Ontario as a vacation destination.

Observations: Heads of households of visitors to Ontario averaged forty-five years of age — only slightly older than their non-visitor counterparts. Visitors to Ontario had higher educational, higher occupational and higher income levels than non-visitors. The mean expenditure of visitors on trips to Ontario was approximately \$300.

Most trips to Ontario were vacation trips, having an average duration of 10 days. The majority of visitors who indicated they intended to return to Ontario lived within 150 miles of the Ontario border and had their place of origin in our primary marketing area. Oddly enough the dominant picture of Ontario held by both U.S. visitors and non-visitors alike was that of a natural wilderness.

U.S. cottagers were the most reliable and permanent customers of all vacation areas in the province; 9.1 per cent of our return

visitors owned a cottage, cabin or house in Ontario.

The primary activity for Ontario trips was sightseeing; the primary activity for non-Ontario trips was visiting friends and relatives. This was reflected in the type of accommodation used. American visitors to Ontario stayed primarily at commercial hotels and motels. For Ontario trips over one week's duration, more than one out of five families used camping or tent accommodations. Non-Ontario travellers were more likely to stay at the homes of friends or relatives, or at hotels or motels.

Nearly half of the Ontario visitors who had not been to their vacation destination before sent for literature to aid in their choice of destination, while one-quarter of the non-Ontario visitors sent for literature.

Nearly one-third of the non-visitors to Ontario listed the need for more information as a condition for spending part of their next vacation in Ontario. Over 18 per cent of the Ontario visitors who did not already intend to come to Ontario next year indicated a need for more information before spending a vacation in Ontario.

Prepared By: McDonald Research Limited, Toronto

Published By: Ontario Department of Tourism and Information

Date: October, 1966

Note: LIMITED EDITION

Available on loan by arrangement with Travel Research Branch

ANALYSIS OF U.S. VISITOR-PROSPECTS TO ONTARIO

(Resulting from an Experiment in Direct Mail Promotion)

Purpose: To discover which one of the following three sources of addresses of U.S. households to which descriptive literature on Ontario was sent, generated the most visitors to Ontario; the Ontario Government Reception Centres' guest registration cards list, the Ontario Department of Tourism and Information mailing list, the R.L. Polk and Company list.

Observations: The mailing list of the Department of Tourism and Information had the highest incidence of visitors to Ontario followed by the Ontario Government Reception Centres' guest registration cards list.

Characteristics of U.S. households were also obtained. In 1966, the average number of

"out-of-state" trips per year for U.S. households questioned was 1.6 trips. The head of the household visiting Ontario in 1966 earned an average of approximately \$11,000 a year and was forty-five years of age.

Recommendations: Since the Polk listing was the weakest generator of visitors to Ontario and the Ontario Government listings were the strongest, descriptive literature on our province should be addressed mainly to those persons in the Ontario Government listings.

Furthermore, Ontario advertising should be organized in such a way as to induce potential visitors to our province to write to the Department for further information on travel to and throughout Ontario.

Prepared By: Peter Klopchic, Ph.D.
Director, Travel Research Branch

Published By: Ontario Department of Tourism and Information

Date: March, 1967

Note: FILE COPIES ONLY

Available on loan by arrangement with Travel Research Branch

Data updated to Report No. 38

"An Analysis of U.S. Visitor-Prospects to Ontario

A Comparative Study of the Years 1966 and 1968"

GASOLINE STATION SURVEY OF U.S. VISITORS TO ONTARIO

AUGUST, 1966

Purpose: By a random sampling of American tourists who stopped at service stations across Ontario, the Travel Research Branch endeavoured to obtain more data and validate data already obtained, on the socio-economic characteristics of U.S. visitors to Ontario, the degree of their awareness of Ontario Government Reception Centres, and advertising and promotion in various U.S. media by Ontario.

Observations: U.S. visitors to Ontario are, generally speaking, middle-aged, in high occupational levels, with an above average income, who originate in one of the 10 states which form our primary marketing area.

The primary reason for their visit to Ontario was "friends and relatives". The print medium (magazine and newspaper articles) was also very successful in attracting a substantial number of American tourists.

Visitors appreciated the beauty of our province and the care taken of facilities offered them. Scenery and cleanliness were given highest ratings; second most pleasant fea-

ture was the hospitality received; third were our historic sites and attractions.

Ontario has a great many "repeat" visitors which speaks well for the excellence of our scenery, tourist plant and tourist facilities; two-thirds of our American tourists were repeat visitors. The average number of visits by respondents to Ontario was 7.1. More than two-thirds of the respondents indicated they intended to return to Ontario sometime in the future.

Awareness of Ontario Government Reception Centres was very high (75%) among our U.S. tourists and 60 per cent of the respondents interviewed stated they had already paid a visit to one of the many Centres available.

The above data was compared with data obtained from our 1967 *U.S. Visitor-Prospects Study*, the 1966 *U.S. Tourist Study*, and the 1966 *U.S. Visitor Study*. In practically all instances the results obtained were very similar, thereby substantiating the validity of our findings.

Prepared By: Peter Klopchic, Ph.D.
Director, Travel Research Branch

Published By: Ontario Department of Tourism and Information

Date: March, 1967

Note: FILE COPIES ONLY

Available on loan by arrangement with Travel Research Branch

Data updated to Report No. 28

"A Study of U.S. Visitors to Ontario Gas Station Report — 1967"

TOURIST ESTABLISHMENT OCCUPANCY IN ONTARIO BY TOURIST REGION

JULY AND AUGUST, 1967

Purpose: To calculate the average occupancy of all types of tourist establishments in Ontario by type of establishment and by vacation

area during the months of July and August, 1967.

Observations:

Summary of Average Total Occupancy of all Ontario Tourist Establishments by Type of Establishment, July and August, 1967 — In Per Cent

Month	Total for Ontario All Types of Establishments	Hotel Motor Hotel (LLB)	Hotel (Not LLB)	Motel	Lodge	Cottage	Cabin	Campsite	Other
July	66%	68	54	75	56	74	52	41	56
August	68%	73	42	79	56	75	48	41	40

	July	August
Establishments selected for sample	957	955
Correct responses received and tabulated	699	503
Correct responses (in per cent of selected sample)	73%	53%

Prepared By: Travel Research Branch
Director, Peter Klopchic, Ph.D.

Published By: Ontario Department of Tourism and Information

Date: February, 1968

Note: Continuous Study, FILE COPIES ONLY
Available on loan by arrangement with Travel Research Branch
Data updated to Report No. 32
"Ontario Tourist Establishment Occupancy
January and July, 1968"

STRATFORD VISITORS SURVEY

Purpose: To determine Stratford's popularity; to reveal the impact and value of tourism to the area and means of improvement.

Observations and Recommendations: The focal point of the Stratford area is the theatre. The high incidence of properly completed replies alone indicates the great interest of respondents in the Shakespearian Festival.

The average number of visits to the theatre per party was 5.7. Trip parties were composed of two to three individuals, mainly adults, with women more frequently represented than men. Those in professional occupations represented 62 per cent of the visitors and among these teachers had the highest frequency. The average expenditure per party was \$116.35. The total tourist expenditure was approximately \$8 million. Respondents' main reason for visiting Stratford was the Festival Theatre. Reasons of "pleasure" and "vacation" followed.

Patrons of the theatre are more or less permanent customers; 76 per cent stated they had visited the city previously. It appears that once attracted, the tourist will likely return again and again. The theatre should, therefore, maintain its high calibre of performance for the continued growth of the number of its visitors.

The passenger car was by far the most common mode of transportation indicating the importance of good roads, adequate directive and informative signs, washroom facilities, and parking space for the visiting motorist.

The theatre-goer was also a creator of a substantial demand for tourist accommodation; on the average, patrons stayed in the city for 2.2 nights.

It was estimated that about 20 per cent of the employment in Stratford and its environs was generated directly or indirectly by tourism. Although the theatre is the main attraction, 74 per cent of the total tourist expenditure was spent on "other" facilities resulting from the theatre visit. Museums and historic sites attracted 44.7 per cent of the visitors. Other attractions such as picnicking, boating and swimming are worth preserving and developing as they have a powerful impact on tourism and, alongside the powerful tourist attraction, create revenue. The benefits to be derived from the tourist industry should be emphasized to local merchants and all interested organizations in order to obtain their co-operation in carrying out improvements to community facilities and in promoting the City of Stratford and the Festival Theatre in their appropriate markets, specifically Ontario, Quebec and the American States of Michigan, New York, Ohio and Illinois.

Prepared By: Peter Klopchic, Ph.D.
Director, Travel Research Branch

Published By: Ontario Department of Tourism and Information

Date: July, 1967

A STUDY OF THE TRAVEL HABITS OF ONTARIO HOUSEHOLDS

JUNE 15, 1966 TO JUNE 14, 1967

Purpose: To obtain and measure in a quantitative aspect, reliable information on the travel patterns, travel habits and expenditures of Ontario residents throughout the year.

Observations: In 1966-67, Ontarians made an average of 8.35 trips per household, or a total of approximately 15.7 million trips, 72 per cent of which were personal trips (visiting friends and/or relatives, shopping, other personal reasons), 15.8 per cent were vacation trips and 12.5 per cent, business. The average income of those Ontario families who took trips in 1966-67 was \$7,410 of which \$462 was spent on direct disbursements for travel. In addition, approximately \$593 was spent on items related to travel such as automobiles, boats, cottages, skiing, hunting and fishing equipment, and outdoor recreation clothing. The passenger car was the most frequent mode of transportation in all trip categories. For overnight accommodation, the homes and cottages of friends and relatives were most extensively used on vacation and personal trips.

Recommendations: An examination of the expenditures made revealed that almost half

of the total tourist expenditure on trips (\$868.8 million) was generated by vacation trips. Because of the high economic importance of vacation trips to the tourist industry, Ontario residents should be persuaded by effective advertising, and by provision of attractive facilities to vacation within their province.

The City of Toronto was the destination of a great number of trips made by Ontario residents, to visit friends or relatives, to shop and for entertainment and business reasons, showing the large potential for tourism in the Metropolis. All these factors could be utilized in promoting and developing the many interesting attractions in the area to serve its visitors. Another important trip destination was the Niagara-Iroquoia vacation area which attracted 12.7 per cent of the total number of trips made by Ontario households.

Commercial hotels and motels, together with resort hotels, were the most predominant type of accommodation used by respondents on business trips. Hotel investment should therefore be considered as a basis for financing the tourist industry.

Prepared By: Peter Klopchic, Ph.D.
Director, Travel Research Branch

Published By: Ontario Department of Tourism and Information

Date: June, 1969

FEASIBILITY STUDY OF RECREATIONAL BOATING ON THE GRAND RIVER

Purpose: To show the economic and recreational benefits to the tourist industry derived from the construction of a canal on the Grand River.

Observations and Recommendations: In spite of its segmentation because of insufficient dams and lockage, about 700 boats use the Grand River annually. If the river were opened to navigation from Port Maitland to Brantford, the number of boats and their use of the river would be greatly increased with a resultant economic benefit to all adjacent communities.

A canal and lock system would be a recreational facility which would provide abundantly for the outdoor needs of this densely populated area which has already shown a dynamic increase in tourist development over the past 15 years. A navigable waterway accompanied by suitable tourist accommodations and facilities could be used for both short term and long term vacations thereby helping this area and keeping our tourist dollars "at home". Because of its access to Lake Erie and the American border, a Grand Canal would attract more of the American recreational boating public.

With construction, a canal on the Grand River would undoubtedly create an assured potential of 5,000 Canadian and American tourist-boaters per year. Cost of construction

was estimated at \$10 million but the canal could create an economic activity of approximately \$4 million per year after its completion. The tax revenue from this expenditure could amount to at least \$630,000 for all three levels of government.

Factors are also dependent upon an understanding between the Federal and Provincial Governments and the involvement of the Iroquois of the Six Nations who hold such a significant part of the river on their reserve. Careful planning and management are called for, particularly with regard to the control of pollution, conservation measures to regulate and make even the flow of the river, the development of a communications pattern, and the establishment of inducements to tourists to detour through and stay in the area longer.

The Grand River Valley already has a significant number of tourist attractions including the Alexander Graham Bell home in Brantford, the Mohawk chapel and the Six Nations Indian Reserve where displays of Indian handicrafts are highly appreciated by tourists. Development of parks along the length of the proposed canal is essential to its success and the beginning of a high standard of tourist interest. Because of the vital importance for the improvement of our tourist plant to maintain our tourist income dollars, it is the responsibility of the Federal Government to recognize the need for these facilities.

Prepared By: Peter Klopchic, Ph.D.
Director, Travel Research Branch

Published By: Ontario Department of Tourism and Information

Date: January, 1968

VISITORS TO ONTARIO GOVERNMENT RECEPTION CENTRES

1965 AND 1966

Purpose: Since persons visiting Ontario Government Reception Centres are representative, to some extent, of the average tourist in Ontario, a survey was made of a representative sample in order to obtain data on the origin, travel patterns and final destination of visitors to Ontario; to discover the number of visits made, the type of accommodation used and the main reasons for visiting each vacation area in particular, and Ontario in general.

Observations: Each year, the various states of the U.S.A. generated more or less the same percentage of visitors to Ontario Government Reception Centres. This type of U.S. visitor may be described as one whose origin lay in a state bordering on or near Ontario, particularly the States of Michigan and New York.

American tourists tended to vacation at the same location in Ontario each year, relying most extensively on commercial motels and provincial campsites for accommodation. They stayed in the province for an average duration of about one week. "Touring the province", "quiet relaxation", "scenery and natural beauty" and "fishing" were the main reasons for vacationing in Ontario by Ameri-

can and Canadian (including Ontarian) tourists alike.

About three-quarters of those U.S. tourists who registered at our Reception Centres visited one of the following seven vacation areas preferred, in general, by American tourists to Ontario: Niagara-Iroquoia, Essex-Kent, Algoma, Seaway Valley, Rideau — 1,000 Islands, Lambton-Sarnia and Upper Lake Superior. Vacation area destinations of Ontarian and other Canadian tourists differed considerably from that of our U.S. visitors.

Recommendations: The long-term U.S. visitor to Ontario (three or more days) contributed significantly to the total tourist expenditure. Since the long-term tourist is the most desirable type of tourist, from an economic viewpoint, advertising and development policies should be oriented towards them.

Private business, Chambers of Commerce and the Ontario Department of Tourism and Information should pay special attention to vacation areas preferred by our American visitors as there is a close correlation between the number of guest-days and the amount of money spent in the community.

Prepared By: Travel Research Branch
Director, Peter Klopchic, Ph.D.

Published By: Ontario Department of Tourism and Information

Date: September, 1967

Note: Continuous Study, FILE COPIES ONLY
Available on loan by arrangement with Travel Research Branch
Data updated to Report No. 37
"Visitors to Ontario Government Reception Centres
1965 to 1967"

WESTERN EUROPEAN TRAVEL TO CANADA AND ONTARIO

Purpose: To show the economic benefits of increased Western European travel to Canada and Ontario; to assess these findings with respect to the further promotion of Ontario as a tourist area in Western Europe in order to obtain the full economic benefits of world-tourism.

Observations: The expenditures of overseas tourists to Canada have increased at so steady and rapid a rate that the ratio of increase of expenditures of the overseas tourist has surpassed the ratio of increase of expenditures of the American tourist. Expenditures of U.S. tourists to Canada rose from \$375.1 million in 1960 to \$730.0 million in 1966 - an increased index of 194.6. In comparison, the expenditures of overseas tourists to Canada rose from \$45 million in 1960 to \$110 million in 1966 - an increased index of 244.4.

Of the overseas tourist, 67.8 per cent had their place of origin in Western Europe. In all probability, these tourists generated 68 per cent of the total overseas tourist expenditure in Canada.

In 1966, 410,763 overseas tourists spent approximately \$110 million in Canada. This was an average of about \$268 per visitor. Of the total number of overseas tourists, 228,033

visited Ontario and spent approximately \$61.1 million generating an economic activity of approximately \$122.2 million.

Recommendations: More than two-thirds of all overseas tourists to Canada travel via the United States of America. Thus, it would be to the advantage of the Ontario Provincial Government and the American Federal Government to jointly promote their advertising efforts in Europe.

With the "Great Age of Mobilism" just around the corner, the cost of transoceanic flight will be lowered further facilitating overseas travel to Ontario. With the positive and hopefully lasting effects of Expo '67 we may expect an even greater influx of overseas tourists.

Overseas tourist expenditure in Ontario already represents 13 per cent of our total foreign tourist expenditure. Furthermore, it is increasing more rapidly than U.S. expenditure in the province and there are sound indications that this will continue into the future. Thus our central aim should be to intensify our promotion of Ontario in Western Europe, the main generator of overseas travel to our province.

Prepared By: Peter Klopchic, Ph.D.
Director, Travel Research Branch

Published By: Ontario Department of Tourism and Information

Date: June, 1967

A STUDY OF U.S. VISITORS TO ONTARIO

GAS STATION REPORT — 1967

Purpose: By conducting a random sampling of U.S. tourists who stopped at service stations located throughout the province, the Travel Research Branch endeavoured to obtain additional data on the socio-economic characteristics of U.S. visitors to Ontario; the degree of awareness of advertising and promotion in various U.S. media done by the Ontario Department of Tourism and Information; and the degree of awareness of the existence of the Ontario Government's Reception Centres.

Observations: In 1967, the number of first-time visitors to Ontario increased from 28.9 per cent, obtained in 1966, to 33.3 per cent. The majority (72.3%) of these first-time visitors were pleased and satisfied with their vacation in Ontario.

The average age of respondent party-heads ranged from the late thirties to the early forties; the average earned income was \$10,210.

Respondents stayed in Ontario for an average of 4.9 days. Hotel and motel accommodation was utilized by approximately half of the respondents; a quarter of the respondents used campsites while others rented cottages or cabins or stayed with friends or relatives.

Of the respondents, 83.3 per cent had their place of origin in our primary marketing area. Coincidentally, 53 per cent had noticed advertising on Ontario and a surprising number (45%) were able to correctly name the publication in which the advertisement had appeared.

Recommendations: It is believed that U.S. citizens generally underestimate tourist attractions in Ontario. The reported high incidence of satisfaction might, therefore, have been lower. Advertising and promotion branches in the Department should stress and make known Ontario's many attractions, her modern accommodation and her scenic beauty which allows for variety in vacationing.

Almost half of all of the first-time visitors came to Ontario en route to or from Expo. It is significant that a single, well-publicized event was able to attract so many first-time visitors. Ontario should learn from this and should direct and intensify promotion of such large scale attractions as the Stratford Festival, the Shaw Festival, Niagara Falls, the Canadian National Exhibition and the national capital, Ottawa, to her potential visitors.

Prepared By: Peter Klopchic, Ph.D.
Director, Travel Research Branch

Published By: Ontario Department of Tourism and Information

Date: January, 1968

GREAT LAKES PLEASURE BOATING SURVEY

Purpose: To discover the effect of changing water levels on pleasure boating on the Great Lakes; to discover the reaction and adaptation of boat-owning cottagers in the areas affected.

Observations: The majority of cottage-owners on any one of the Great Lakes own a pleasure boat. More than half owned a boat less than 16 feet in length averaging approximately \$2,468 in value. The majority of boat-owners stored their crafts on their cottage property. Others stored their boats either at home or at a marina.

Boat-owners were predominantly middle-aged, married males; more than half also owned a relatively new model car.

It was found that changes in the water levels of Lake Huron, Lake Erie and Lake Ontario have resulted in navigational hazards. Rocks, sand bars, weed growths and altered shorelines have had considerable effect on boating activities in these areas. With a low water level, such as the one that occurred in 1964, boaters have had to adjust to this condition by extending their wharves, or dredging channels. Some even found it necessary to locate another launching site or to completely relinquish the use of their boats.

It was discovered that increasing or decreasing the lake level by one foot in "low" or "high level areas" would have very little or no effect on pleasure boating.

Only Lake Superior remained free from any effects of changing water levels.

Prepared By: Peter Klopchic, Ph.D.
Director, Travel Research Branch

Published By: Ontario Department of Tourism and Information

Date: July, 1966

Note: FILE COPIES ONLY
Available on loan by arrangement with Travel Research Branch

STATISTICAL HANDBOOK, 1968

Purpose: The 1968 Statistical Handbook provides relevant data on the tourist industry in Ontario illustrating the vital role of tourism as a circulator and distributor of wealth, and the impact of tourist expenditures on the economy of the province. Uniform statistical data on the Ontario tourist plant is thereby made readily available for use by various government departments and private organizations.

Contents: The Statistical Handbook is but a summary of all existing valid data on the province's tourist industry covered under the following topics:

1. An estimate of the total expenditures made by tourists in Ontario, and Canada.
2. (a) The number of tourists visiting Ontario, their place of origin and their mode of travel.
(b) The number of visitors to Ontario Government Reception Centres.
3. (a) The number of provincial parks in Ontario and their number of visitors.
(b) Attendance figures for the selected sites of Fort Henry and Upper Canada Village.

(c) Attendance figures at various park facilities presented by the Niagara Parks Commission.

4. Detailed statistics on the main aspects of tourist establishments in Ontario.
5. A comparison of Ontario's promotional expenditures with actual foreign tourist expenditures in the province. Ontario's publication and advertising expenditures are also compared with promotional expenditures made by the Province of Quebec and Canada (all provinces combined), and those made by the Canadian Government Travel Bureau.
6. Statistics on pleasure boating in Ontario.
7. Statistics on the growth of U.S. visitors to Ontario.
8. A summary of overseas visitors to Ontario, and Canada for the year 1966.
9. The 1967 July and August tourist establishment occupancy figures are included in the appendix.

Prepared By: Travel Research Branch
Director, Peter Klopchic, Ph.D.

Published By: Ontario Department of Tourism and Information

Date: April, 1968

CAMPING DEVELOPMENT IN ONTARIO (PROGRESS REPORT)

Purpose: To compile statistical data on the origin, destination and growth, plus other related aspects, of campers in Ontario with special emphasis on those campers originating in the U.S.

Observations: The camper is a "special" type of tourist. Due partially to the fact that camping is within the financial means of a large segment of the Canadian and American population, the demand and popularity of campsites is growing and will continue to grow into the future. The total number of campers in Ontario in 1966 alone was estimated at approximately 2.3 million persons. In 1955 there were only 58 commercial campsites in Ontario; in 1966 this figure climbed to 415.

The increasing number of provincial campsites and campers is also significant. In 1958, there were 277,183 campers for 3,687 developed provincial campsites. In 1966, the 15,922 recorded provincial campsites had 994,787 campers.

The number of campers in Ontario's National Parks has also grown within the past decade

despite the fact that the number of developed campsites levelled off to 642 in 1960.

Since 1963, the number of campers per campsite has remained oscillating around 60 persons. A considerable amount of economic activity has also been generated by this type of "tourist".

Approximately 28 per cent of the campers to Ontario had their place of origin in the U.S. American campers came primarily to tour the province, to enjoy the scenery, to relax and to fish. They stayed in the province for about one week's duration and made an average 10.1 trips to Ontario. Thus, once attracted, they prove to be a reliable return "customer".

Recommendations: As the necessity to seek outdoor relaxation increases, demand for improved campsites and camping equipment by the urban population will become more intensive. Municipal, Provincial and Federal Government should provide every assistance, either directly or indirectly, in the development of this type of recreation.

Prepared By: Travel Research Branch
Director, Peter Klopchic, Ph.D.

Published By: Ontario Department of Tourism and Information

Date: July, 1968

ONTARIO TOURIST ESTABLISHMENT OCCUPANCY

JANUARY AND JULY, 1968

Purpose: To determine the average total occupancy of all types of tourist establishments in Ontario by type of establishment and by vacation area during the months of January

and July, 1968; to determine the average total occupancy of all Ontario tourist establishments by type of establishment according to the number of rental units available.

Observations:

Summary of Average Total Occupancy of All Ontario Tourist Establishments by Type of Establishment, January and July, 1967 and 1968 — In Per Cent

(a) Average January Occupancy

Year	Total for Ontario All Types of Establishments	Hotel Motor Hotel (LLB)	Hotel (Not LLB)	Motel	Lodge	Cottage	Cabin	Campsite	Other
1967	46%	52	-	41	8	46	N/A	N/A	24
1968	46%	49	59	39	17	N/A	71	N/A	54

(b) Average July Occupancy

1967	66%	68	54	75	56	74	52	41	56
1968	68%	62	47	73	70	84	60	51	68

Average total occupancy of all Ontario Tourist Establishments by type of establishment according to number of rental units available, January and July, 1968 — In Per Cent

Month	Average Total Occupancy	Hotel Motor Hotel (LLB)	Hotel (Not LLB)	Motel	Lodge	Cottage	Cabin	Campsite	Other
Jan.	30 or more rental units	53%	83	43	20	N/A	N/A	-	50
	29 or less rental units	40%	36	37	15	1	71	2	56
July	30 or more rental units	65%	56	84	81	94	100	54	100
	29 or less rental units	57%	40	70	65	84	59	42	63

Note: As can be observed, the average total occupancy index for each type of establishment for all Ontario tourist establishments was higher for those having 30 or more rental units available. However, in some instances the response was very low and this lessened the validity of the index.

	1967		1968	
	January	July	January	July
Establishments Selected for Sample	240	957	499	913
Correct Responses Received and Tabulated	133	699	388	680
Correct Responses (In Per cent of Selected Sample)	55%	73%	78%	74%

Prepared By: Travel Research Branch
Director, Peter Klopchic, Ph.D.

Published By: Ontario Department of Tourism and Information

Date: January, 1969

Note: Continuous Study, FILE COPIES ONLY
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Data updated to Report No. 43
"Ontario Tourist Establishment Occupancy
January and July, 1969"

NORTHWESTERN ONTARIO TOURIST INDUSTRY STUDY

Purpose: To evaluate, in broad terms, the potential of Northwestern Ontario to support the growth of tourism and recreation; to identify in terms of programs and a limited number of potential projects, means whereby the Provincial Government could encourage and stimulate this growth.

Rainy River, Lake-of-the-Woods and Patricia were the vacation areas comprising this study area.

Observations: The study area has a most interesting history of exploration and development around which a number of tourist attractions could be built. Moreover, its natural resources are exceptional. In volume of dollars and numbers employed, tourism is now its third industry. In 1966, approximately one million tourists entered this area with 630,000 of them staying overnight. The total estimated tourist expenditure ranged around the \$30 million mark.

The study area is naturally divided into two major regions: the region north of the English River and Lac Seul offers specialized hunting and fishing opportunities; the south offers a wide variety of recreational opportunities. The proximity and excellent accessibility of the study area to the U.S. and to Winnipeg creates a potential market for a modest winter recreation centre.

The Lake-of-the-Woods vacation area is judged to offer recreational opportunities of international significance. The quality of sport fishing and hunting is justly famous. What is lacking however, is the demand pressure of a large accessible urban market.

Recommendations: The total value of tourism can be expected to increase in response to certain positive stimuli concerned mainly with

better planning, new capital formation and the diversification of activity opportunity. The stimulus of government assistance and control could be expected to result in substantial growth both in the volume of tourism and its impact on the local economy.

Of the numerous recommendations made in the report, the following are the most significant: a close liaison should be established between the Departments of Highways and Lands and Forests in planning cottage subdivision of Crown Land. Planning of all cottage developments would be co-ordinated by the Tourism Development Committee.

A data collection program for the Kenora Transportation Study should be designed in co-operation with other Provincial Government Departments.

The Government should encourage the development of family-oriented recreation facilities by resort operators and assist in the establishment of a number of special attractions in the study area.

The following feasibility studies should be commissioned: to estimate the costs and benefits of constructing a waterway navigable to pleasure cruisers from Lake LaCroix to Lake Winnipeg (the co-operation of the Government of Manitoba should be sought); to determine the costs and benefits of enlarging at least one of the airports in the study area to standards required by Viscount-type aircraft and private jets; to investigate developing a year-round resort in the Kenora area offering a wide range of family winter recreation; to investigate the opening of a recreation highway to develop the White Otter Lake District.

Consideration should also be given in carrying out excavations in the large Indian Burial Ground west of Emo.

Prepared By: Kates, Peat, Marwick & Co.

Published By: Ontario Department of Tourism and Information

Date: May, 1968

Note: LIMITED EDITION

Available on loan by arrangement with Travel Research Branch

VACATION VISITS TO ONTARIO

BOAT AND COTTAGE OWNERSHIP IN ONTARIO, FALL, 1967

Purpose: To determine the number of holiday trips taken in Ontario by Canadians, eighteen years of age and over, within the three weeks prior to November, 1967; the number of cottages owned directly or by friends or relatives at which Ontario households could readily vacation; the number, type and storage facilities of boat-owning Ontario households.

Observations: A third of all Canadian adults, including Ontario residents, had vacationed in Ontario at least once within the past three years; 12 per cent of whom had taken three or more trips during this period. Vacation propensity naturally varied according to the area of residence. Six out of ten Ontario adults vacationed in Ontario. Three out of ten vacationed less than once a year. The propensity of other demographic groups to visit Ontario on holidays was primarily related to whether or not people vacationed at all. If a person did holiday, he had about the same likelihood of holidaying in Ontario irrespective of his socio-economic sub-group.

Resident cottage-owners in Ontario were much more likely to holiday in the province than others. Their frequency of trips was also much higher. Only 11 per cent of Ontario households owned a cottage, but 45 per cent reported that they could readily vacation at a cottage owned either by themselves or by friends or relatives. Only 30 per cent reported availability of cottages outside Ontario and these were mainly situated in Quebec. Although the ownership of cottages in the top socio-economic group was double that of the lowest socio-economic group, community size and family composition appeared to have little relationship to cottage ownership or accessibility.

Only one out of eight Ontario households owned a boat. Six out of ten boats were power-operated. The highest socio-economic group was twice as likely as the average group to own a boat. Boat-ownership was also associated with households having teenage children. Over half of all Ontario cottage-owners owned a boat, especially canoes and rowboats. Over half of these boats were kept at cottages; a third were kept at home.

Prepared By: Canadian Facts Co. Limited, Toronto

Published By: Ontario Department of Tourism and Information

Date: May 17, 1968

Note: LIMITED EDITION

Available on loan by arrangement with Travel Research Branch

ATTITUDES OF U.S. HOUSEHOLDS TOWARDS TRAVEL TO ONTARIO

A Study of the Market for Tourism in the Province of Ontario

From Four Metropolitan Areas in the U.S.A., April, 1968

Purpose: To develop a profile of American tourists to Ontario compared with those who had made recent pleasure/vacation trips of comparable distance but had never been to Ontario; to measure attitudes toward Ontario of both visitors and non-visitors, including desire to visit, willingness to recommend and their ratings of specific Ontario features.

Observations and Recommendations: Ontario visitors rated our province very highly on rest and relaxation, sightseeing, scenery and climate — the main factors influencing every tourist destination. Both Ontario visitors and travellers to competitive destinations indicated they were also strongly motivated to visit by entertainment and educational features, and attractive customs such as fairs, reviews and festivals. However, some of our visitors were not too favourably impressed in a few Ontario locations with prices, food, accommodation and our overall industrial progress. Action programs should be initiated in such communities.

Many non-visitors indicated they did not know enough about Ontario to decide whether or not they wanted to visit our province. A major project would be to increase knowledge on time-travel to Ontario and other general topics concerning the province.

Tourists to Ontario were more apt to participate in outdoor activities than tourists in general. But although the outdoor appeal acts as a successful base to attract a relative group, it is not broad enough to influence the total market.

Both Ontario visitors and non-visitors preferred to spend their vacation "touring"; they also chose motels rather than hotels as accommodation. Visitor Reception Centres are thus important factors and should be staffed

with the most up-to-date advice, particularly about accommodations, facilities and highways.

Current visitors to Ontario are generally from high level income, educational and occupational groupings who spend well above the average on vacation trips. In recent years, the U.S. visitor to Ontario has also tended to be younger; service facilities should be developed and promoted in the U.S. focusing their attention on the increasing "family" market.

Of those who had visited and travelled around Ontario, 86 per cent indicated they would recommend Ontario to their friends as a place they either must not miss or might enjoy; of those who preferred to stay in one place, 76 per cent said they would recommend Ontario to their friends. Since the recommendation of friends and relatives remains the most influential and informational source in destination choice, a regular program of direct communication with individuals who have visited Ontario should be initiated as they are a prime and relatively inexpensive medium for directing new visitors to Ontario. Visitors to Ontario should be kept informed about developments in tourist attractions so that they will be attracted to revisit themselves and inclined to inform others.

Quebec is as popular a destination choice as Ontario, especially in the high-volume New York market; the need for combined provincial promotion is continuous. Promotion of Ontario as a vacationland should be year-round as opposed to limiting the promotional thrust to selected months. Since it was found that residents of selected cities had unique characteristics and attitudes toward travel to Ontario, promotional efforts should maximize the revenue from each market.

Prepared By: Travel Research International, Inc.

Published By: Ontario Department of Tourism and Information

Date: October, 1968

Note: LIMITED EDITION

Available on loan by arrangement with Travel Research Branch

A STUDY OF AWARENESS OF AND ATTITUDES TOWARDS STE. MARIE AMONG THE HURONS AND OTHER ONTARIO HISTORIC SITES TORONTO AND MIDLAND AREA, NOVEMBER, 1968

Purpose: To determine awareness of Ste. Marie Among the Hurons; to compare attitudes towards visiting this historic site with Old Fort Henry and Upper Canada Village; to determine the extent to which Midland area residents are aware of the number of visitors and the amount of money spent by visitors to the area. General questions concerning preconceived cultural and economic values of historic sites were also asked.

Observations: The historic site of Ste. Marie Among the Hurons consistently placed third in awareness and attitudes of respondents. Only 50 per cent of respondents in Toronto had ever heard of Ste. Marie Among the Hurons compared to 89 and 87 per cent of respondents who were acquainted with Old Fort Henry and Upper Canada Village. Of the list of three, Ste. Marie was rated as the last place one would recommend visiting to American friends or other Canadian friends or to a child living in Toronto by almost half of the respondents; Upper Canada Village was rated the first place one would recommend visiting to American friends by half of the respondents.

Of the respondents living in Toronto, 23 per cent indicated they had visited Ste. Marie Among the Hurons, 49 per cent had visited Fort Henry and 31 per cent had visited Upper Canada Village; 52 per cent of the respondents in the Midland area had visited Ste. Marie Among the Hurons.

More than half of the respondents in Toronto were in strong agreement with the statement that "Sites like this are an important part of the history of Canada and Ontario, and help to make us better Canadians" . . . and that "Historic sites are important in bringing visitors to Ontario and all Ontario residents benefit from the dollars they bring".

Recommendations: Since the historic site of Ste. Marie Among the Hurons proved to be the least known of the three sites selected, added promotion and improved facilities should be encouraged.

Advertising and publicity branches of the Department of Tourism and Information should also make use of the widespread acquaintance of Upper Canada Village and Old Fort Henry to Ontario's benefit.

Prepared By: Canadian Facts Company Limited, Toronto

Published By: Ontario Department of Tourism and Information

Date: December, 1968

Note: LIMITED EDITION

Available on loan by arrangement with Travel Research Branch

VISITORS TO ONTARIO GOVERNMENT RECEPTION CENTRES

Part I - Summary, All Ontario

Part II - By Ontario Vacation Areas

1965 to 1967

Purpose: To obtain reliable information on the origin, destination, travel habits and travel patterns of visitors to Ontario and her Government Reception Centres.

Observations: The origins of U.S. visitors to Ontario Government Reception Centres lay in a state bordering the province. These American tourists, particularly those from Michigan and New York, had a tendency to vacation in the same area each year. They also relied heavily on motels and provincial campsites for overnight accommodation. "Touring the province", "quiet relaxation", "scenery and natural beauty" and "fishing" were the primary reasons given for visiting Ontario. In 1967, "attending a special event" gained additional priority due to the World Fair held in Montreal.

In the northern vacation areas, "fishing" and the "outdoors" were the main attractions to U.S. visitors. A combination of several attractions induced American tourists to visit the southern Ontario vacation areas.

The profile developed for "other" Canadians visiting Ontario proved less reliable than the

profile developed from the American sample. In general, however, Canadians from other provinces were motivated to visit Ontario for the same reasons given by American tourists.

A very small percentage of Ontarians travelling within their home province visited the Reception Centres. Since this group was considered separately from "other" Canadians in 1967, no trends have been established as yet.

Recommendations: Destination patterns revealed that vacation areas situated on or near the Ontario and American border attracted and accommodated more than three-quarters of all U.S. visitors to Government Reception Centres. These same vacation areas enjoyed a similar popularity with "other" Canadian visitors. Preferential areas, such as these, should be given special attention as there is a close correlation between the number of guest-days and the amount of tourist expenditure in the community. When the whole of Ontario is made as easily accessible and as attractive as these "older" vacation areas, the tourist industry will be capable of serving an even greater number of visitors.

Prepared By: Travel Research Branch
Director, Peter Klopchic, Ph.D.

Published By: Ontario Department of Tourism and Information

Date: December, 1968

AN EXPERIMENT IN DIRECT MAIL PROMOTION

AN ANALYSIS OF U.S. VISITOR-PROSPECTS TO ONTARIO

A COMPARATIVE STUDY OF THE YEARS 1966 AND 1968

Purpose: To prove or disprove disclosures formulated by the survey conducted in 1966 and to determine from which of the three address list sources our best visitor-prospects were to be obtained, a similar study was carried out in 1968 utilizing the direct mailing procedure. In 1968, the Polk list was replaced by the Donnelly list to obtain a more accurate picture of the travel patterns of the "average" vacationing American traveller.

Observations: Similar to the 1966 survey, the highest incidence of U.S. visitors to Ontario in 1968, occurred in respondent households whose address source was the inquiry list of the Ontario Department of Tourism and Information; the second highest was in respondent households whose address source was the Reception Centre's guest registration cards. Since the government listings also had the highest incidence of respondent households visiting Ontario during the past five years in both survey years, it is clearly indicative that the experience of former trips to Ontario and/or the experience of direct contact by mail with the Ontario Department of Tourism and Information played a major role in influencing a respondent's decision to visit Ontario. Other major reasons were "the enjoyable experience of former trips,

visiting friends and relatives, other miscellaneous reasons, the recommendations of friends or neighbours" and "fishing and/or hunting". Observed factors also seem to indicate that the "average" American tourist prefers travel to a "foreign" area, such as Ontario, which is in close proximity to home and is yet considered somewhat "different" from the American way of life to which he is accustomed. The brochure mailed out by the Department, however, appeared to be less influential, in 1968, in attracting prospective travellers from the four selected American cities to vacation in Ontario.

Recommendations: The information and style of the brochure must be kept abreast of the times in order that it may be of any "luring" influence on the decision-making processes of prospective American travellers in our primary marketing area.

As households in the government address listings were our best source in contacting prospective visitors to Ontario, our most intensive promotional efforts should be concentrated on these households by means of direct mail or telephone contact (from different points in the U.S.) and other appropriate measures.

Prepared By: Travel Research Branch
Director, Peter Klopchic, Ph.D.

Published By: Ontario Department of Tourism and Information

Date: February, 1970

A SURVEY OF VISITORS TO THE SHAW FESTIVAL THEATRE

NIAGARA-ON-THE-LAKE, 1968

Purpose: To discover and relate the impact of the Shaw Festival, and its visitors, on the tourist market in the Niagara-on-the-Lake region.

Observations: The average party size of patrons to the Shaw Festival Theatre was 3.36, most of whom were drawn from Ontario's "Golden Horseshoe" and from nearby New York State centres. These persons were of a more mature age grouping and tended to be in the professional, teaching, management or clerical occupations. The average age of the respondent party-head was 42.7 years.

The impact of the Shaw Festival was found to be confined to an area where people might commute from their homes to the theatre. Though the average length of time away from home was 1.4 days, approximately 82 per cent of the respondents stayed only one day or less.

The Shaw Festival had a high incidence of repeat visitors - 82 per cent - and it appears that, once attracted to the area, visitors will return again and again.

The average party expenditure ON THE TRIP TO Niagara-on-the-Lake was \$52.51 of which \$33.78 was spent on facilities in the town it-

self. Of an estimated total expenditure of \$420,080 - \$270,240 was spent in Niagara-on-the-Lake.

The main reason given for visiting the town was attendance at the Shaw Festival. Thus it created an awareness of the town for the first time in 54.9 per cent of the respondents.

Recommendations: In order to accommodate the growing number of patrons to the Shaw Festival, and to facilitate a greater penetration into the market area with consequent benefits to the entire Niagara Frontier, the audience capacity of the theatre must be increased.

Accommodating the needs of visitors to the festival (such as sightseeing and dining-out) would increase the pleasurable experience of attending the theatre and supplement the attractiveness of both the festival and the town. However, the development of supporting tourist facilities must be carefully integrated into the existing fabric of the town so as to preserve the unique historical and scenic resources on which tourism depends. In the future, with the implementation of these suggestions more emphasis may be placed on attracting patrons from distant points, particularly from major cities in the United States.

Prepared By: Travel Research Branch
Director, Peter Klopchic, Ph.D.

Published By: Ontario Department of Tourism and Information

Date: June, 1969

A SURVEY OF VISITORS TO MANITOULIN ISLAND, 1968

Purpose: To determine the tourist potential of Manitoulin Island and the characteristics of its visitors.

Observations: Manitoulin Island attracts vacationers of various backgrounds, educational and income levels. While many spend their entire holiday period on the Island (cottagers especially), the Island is essentially a holding area rather than the final destination for a large number of tourists. Tourist, recreation and general leisure time travel was the primary motivation for visiting Manitoulin.

Trip parties were essentially composed of family couples travelling with children twelve years of age or under who spent three to four days on the Island. The average expenditure per respondent-party in the combined road and ferry samples was \$105.83. Because respondent-parties in the road sample stayed for a longer period of time, their average expenditure was double those in the ferry sample.

The Island satisfied visitor requirements and expectations sufficiently to engender a desire for re-visitation in the pursuit of a similar holiday; 52.4 per cent of the respondents were repeat visitors while 45.4 per cent were making their first visit to Manitoulin. Contacts with friends and relatives and "word-of-mouth" created an awareness of the island in 61.6 per cent of the visitors. Oddly enough, considering the length of stay indicated, 65.2 per cent of the respondents did not visit any of the cultural or commercial attractions either on the Island or on the adjacent mainland to the north.

Recommendations: Manitoulin Island proves to be an ideal location for the development of a

provincial park. The provincial government should act immediately in order to avoid any future complicating procedures.

Programs should be initiated to maximize the advantages associated with the presence of an island airport.

Since Ontario, Michigan and Ohio generated 85.4 per cent of all visitors to the Island, promotion of the Island's activities should be directed first to the domestic market and then to the American States. A careful marketing analysis should also be made of the State of Illinois to discover the best means of attracting Illinois tourists to the Island.

Residents should be made aware of the importance of the tourist industry. They should be encouraged to maintain the Island's peaceful atmosphere, improve and modernize tourist accommodation facilities, harbours and boating facilities, and various other features indicated by the respondent rating (including a serious scrutiny of the local prices of goods and services) to meet the standards demanded by tourists. Guaranteed reservations on the Island's ferries should be enforced to prevent serious delays in the travel time of the Island's visitors.

For more pleasurable trips, the Island's gravel roads should be asphalt-surfaced. Snowmobile trails and facilities offer possibilities for development which would extend the tourist season into the winter months.

The production and merchandising of Indian handicrafts require further development and benefits would accrue to both the tourist industry and to those living on the reservations.

Prepared By: Travel Research Branch
Director, Peter Klopchic, Ph.D.

Published By: Ontario Department of Tourism and Information

Date: October, 1969

ONTARIO TOURIST ESTABLISHMENT OCCUPANCY

JANUARY AND JULY, 1969

Purpose: To determine the average total occupancy of all types of tourist establishments in Ontario by type of establishment and by vacation area during the months of January

and July, 1969; to determine the average total occupancy of all Ontario tourist establishments by type of establishment according to the number of rental units available.

Observations:

Summary of Average Total Occupancy of All Ontario Tourist Establishments by Type of Establishment, January and July, 1967, 1968 and 1969 — In Per Cent

(a) Average January Occupancy

Year	Total for Ontario All Types of Establishments	Hotel Motor Hotel (LLB)	Hotel (Not LLB)	Motel	Lodge	Cottage	Cabin	Other
1967	46%	-	52	41	8	46	N/A	24
1968	46%	49	59	39	17	N/A	71	54
1969	49%	54	59	38	14	N/A	N/A	25

(b) Average July Occupancy

1967	68%	68	54	75	56	74	52	56
1968	70%	62	47	73	70	84	60	68
1969	67%	64	58	71	58	77	62	62

Average Total Occupancy of All Ontario Tourist Establishments by Type of Establishment According to Number of Rental Units Available, January and July, 1968 and 1969 — In Per Cent

(a) January Average Total Occupancy

	Year	Hotel Motor Hotel (LLB)	Hotel (Not LLB)	Motel	Lodge	Cottage	Cabin	Other
30 or More Rental Units	1968	53%	83	43	20	N/A	N/A	50
	1969	57%	63	32	23	N/A	N/A	N/A
29 or Less Rental Units	1968	40%	36	37	15	1	71	56
	1969	46%	53	41	12	N/A	N/A	25

(b) July Average Total Occupancy

30 or More Rental Units	1968	65%	56	84	81	94	100	100
	1969	66%	71	77	58	-	96	60
29 or less Rental Units	1968	57%	40	70	65	84	59	63
	1969	60%	40	69	57	77	60	62

	1967		1968		1969	
	January	July	January	July	January	July
Establishments Selected for Sample	240	943	499	902	507	881
Correct Responses Received and Tabulated	133	685	388	669	397	672
Correct Responses (In Per Cent of Selected Sample)	55%	73%	78%	74%	78%	76%

Prepared By: Travel Research Branch
Director, Peter Klopchic, Ph.D.

Published By: Ontario Department of Tourism and Information

Date: March, 1970

Note: Continuous Study

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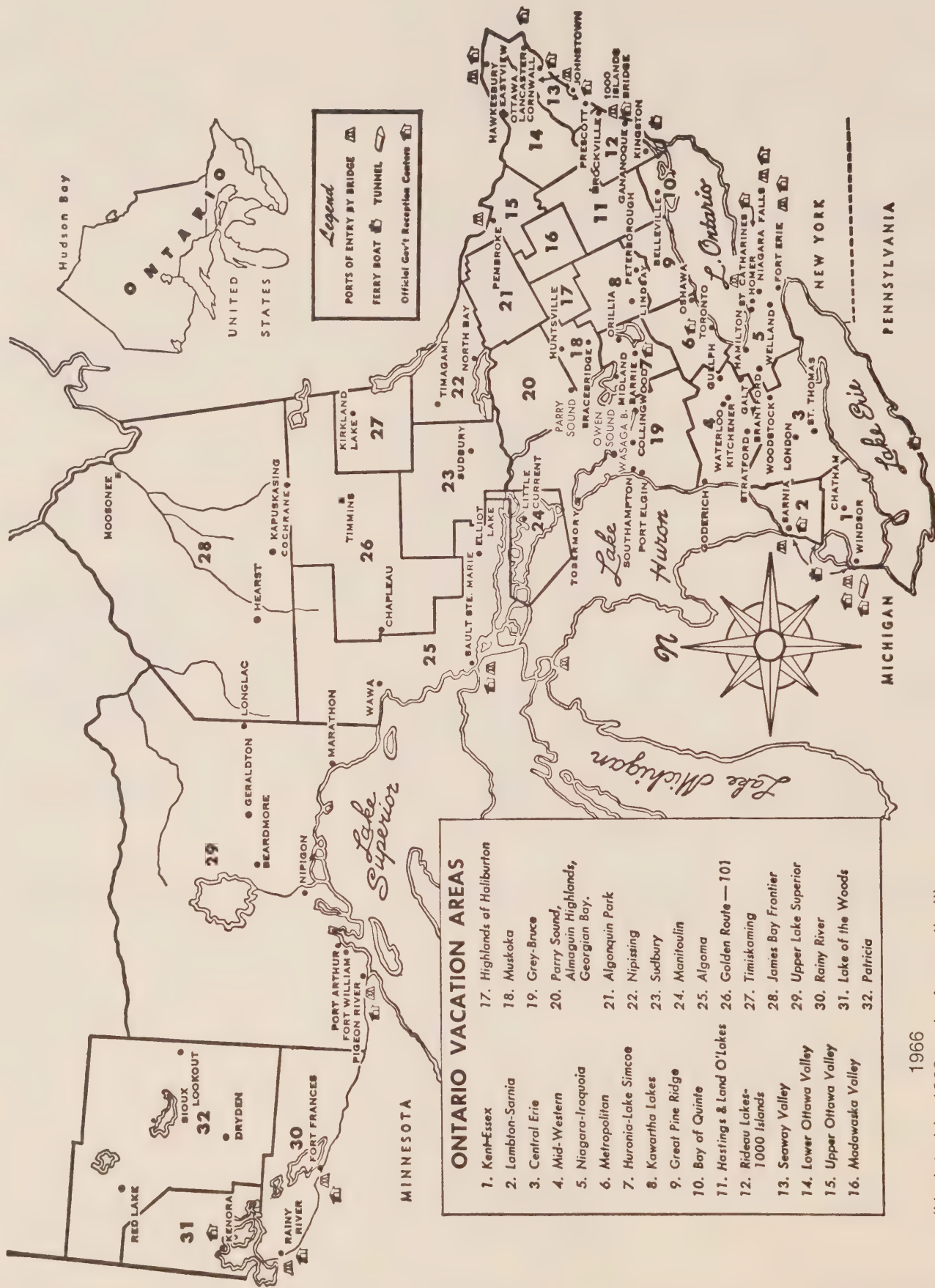
REPORT No.	TITLE OF REPORT
1	A Study of Visitors Who Travelled by Automobile to Atikokan, Ontario June 13th to October 12th, 1964
2	A Study Among Visitors to Elliot Lake, Ontario June 15th to September 15th, 1964
3	Media Influences and Attitudes Toward Travel to Ontario — A U.S. Visitor Study
4	An Analysis of the Muskoka Region Travel Survey September 15th to October 15th, 1964
5	An Analysis of the Travel Habits and Expenditures of Metropolitan Toronto Households April 1964 to April 1965
6	A Short Economic Evaluation of Tourist Boating on the Trent Canal
7	Canal on the Ottawa River — A Short Economic Evaluation
8	Analysis of Survey of Motel Occupancy in Ontario November 1964 to October 1965
9	Tourist Establishment Occupancy in Ontario, by Tourist Region — June and July, 1966
10	Analysis of the Study of the Sudbury Tourist Region The Opinions of its Visitors; The Performance of its Tourist Plant July 1st to September 1st, 1965
11	Data on the Travel Patterns, Origins and Destinations of American and Canadian (Excluding Ontarian) Visitors to Ontario Government Reception Centres — 1965
12	U.S. Tourist Survey, 1966 A Study Conducted on Behalf of the Department of Tourism and Information
13	Statistical Handbook, 1966
14	Report on Skiers, 1966 An Analysis of a Sampling of Skiers Taken at Four Ski Resorts in Ontario December 1965 to April 1966
15	A Summary of a Study of Ontario's Marine Highways in relation to Recreational Boating Requirements
16	Analysis of Expected Travel in Ontario During Expo '67, Estimate of Demand (as of the period April to October, 1966) for Rental Unit Accommodation in Southeastern Ontario During Expo '67
17	A Short Economic Evaluation of Hunting and Fishing in Ontario
18	Feasibility Study of the Museum of the Canadian Fur Trade at the French River

PREPARED BY	YEAR OF PUBLICATION	NOTE
McDonald Research	1964	LIMITED EDITION
McDonald Research	1964	LIMITED EDITION
Marplan	1964	LIMITED EDITION
Travel Research	1965	
Travel Research	1966	
Travel Research	1966	Data Updated to Report No. 49
Travel Research	1966	
Travel Research	1966	
Travel Research	1966	Continuous Study FILE COPIES ONLY Data Updated to Report No. 22
Travel Research	1966	
Travel Research	1966	FILE COPIES ONLY Data Updated to Report No. 37
Ontario Civil Service Commission, Personnel Research	1966	
Travel Research	1966	Data Updated to Report No. 30
Travel Research	1966	
Dominion Consultant Associates	1966	
Travel Research	1966	FILE COPIES ONLY
Travel Research	1966	
Travel Research	1967	FILE COPIES ONLY

REPORT No.	TITLE OF REPORT
19	U.S. Visitors Study
20	Analysis of U.S. Visitor-Prospects to Ontario (Resulting from an Experiment in Direct Mail Promotion)
21	Gasoline Station Survey of U.S. Visitors to Ontario August, 1966
22	Tourist Establishment Occupancy in Ontario by Tourist Region — July and August, 1967
23	Stratford Visitors Survey
24	A Study of the Travel Habits of Ontario Households June 15, 1966 to June 14, 1967
25	Feasibility Study of Recreational Boating on the Grand River
26	Visitors to Ontario Government Reception Centres 1965 and 1966
27	Western European Travel to Canada and Ontario
28	A Study of U.S. Visitors to Ontario Gas Station Report — 1967
29	Great Lakes Pleasure Boating Survey
30	Statistical Handbook, 1968
31	Camping Development in Ontario (Progress Report)
32	Ontario Tourist Establishment Occupancy January and July, 1968
33	Northwestern Ontario Tourist Industry Study
34	Vacation Visits to Ontario Boat and Cottage Ownership in Ontario — Fall, 1967
35	Attitudes of U.S. Households Towards Travel to Ontario, A Study of the Market for Tourism in the Province of Ontario from Four Metropolitan Areas in the U.S.A. — April, 1968
36	A Study of Awareness of and Attitudes Towards Ste. Marie among the Hurons and other Ontario Historic Sites, Toronto and Midland Area, November, 1968
37	Visitors to Ontario Government Reception Centres Part I - Summary, All Ontario Part II - By Ontario Vacation Areas 1965 to 1967
38	An Experiment in Direct Mail Promotion An Analysis of U.S. Visitor-Prospects to Ontario A Comparative Study of the Years 1966 and 1968
40	A Survey of Visitors to the Shaw Festival Theatre Niagara-on-the-Lake, 1968
41	A Survey of Visitors to Manitoulin Island, 1968
43	Ontario Tourist Establishment Occupancy January and July, 1969

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PREPARED BY	YEAR OF PUBLICATION	NOTE
McDonald Research	1966	LIMITED EDITION
Travel Research	1967	FILE COPIES ONLY Data Updated to Report No. 38
Travel Research	1967	FILE COPIES ONLY Data Updated to Report No. 28
Travel Research	1968	Continuous Study FILE COPIES ONLY Data Updated to Report No. 32
Travel Research	1967	
Travel Research	1969	
Travel Research	1968	
Travel Research	1967	Continuous Study FILE COPIES ONLY Data Updated to Report No. 37
Travel Research	1967	
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Travel Research	1966	FILE COPIES ONLY
Travel Research	1968	
Travel Research	1968	
Travel Research	1969	Continuous Study FILE COPIES ONLY Data Updated to Report No. 43
Kates, Peat, Marwick & Co.	1968	LIMITED EDITION
Canadian Facts	1968	LIMITED EDITION
Travel Research International Inc.	1968	LIMITED EDITION
Canadian Facts	1968	LIMITED EDITION
Travel Research	1968	
Travel Research	1970	
Travel Research	1969	
Travel Research	1969	
Travel Research	1970	Continuous Study
Dept. of Tourism and Information		



1966

(Updated in 1969 as in Appendix ii)

PROVINCE OF ONTARIO THIRTY-SEVEN VACATION AREAS

(Revised 1969)

ONTARIO VACATION AREAS

1969

- | | |
|--|--|
| Essex-Kent
1. Lambton-Sarnia
2. Central Erie
3. Mid-Western
4. Niagara-Iroquoia
5. Metropolitan
6. Huronia-Lake Simcoe
7. Kewartha Lakes
8. Great Pine Ridge
9. Bay of Quinte
10. Hastings
11. Rideau Lakes -- 1000 Islands
12. Seaway Valley
13. Lower Ottawa Valley
14. Upper Ottawa Valley
15. Madawaska Valley
16. Highlands of Haliburton
17. Muskoka
18. Grey-Bruce | 20. Parry Sound
21. Almaguin Highlands
22. Georgian Bay
23. Algonquin Park
24. Nipissing
25. Sudbury
26. Manitoulin
27. Algoma
28. Golden Route -- 101
29. Timiskaming
30. James Bay Frontier
31. Upper Lake Superior
32. Rainy River
33. Lake of the Woods
34. Patricia
35. Land of Lakes
36. Superior Northern Route
37. Kinniwabi Pines
38. Capital Tourist Region
39. Lake Simcoe |
|--|--|



REGIONS VACATION AREAS

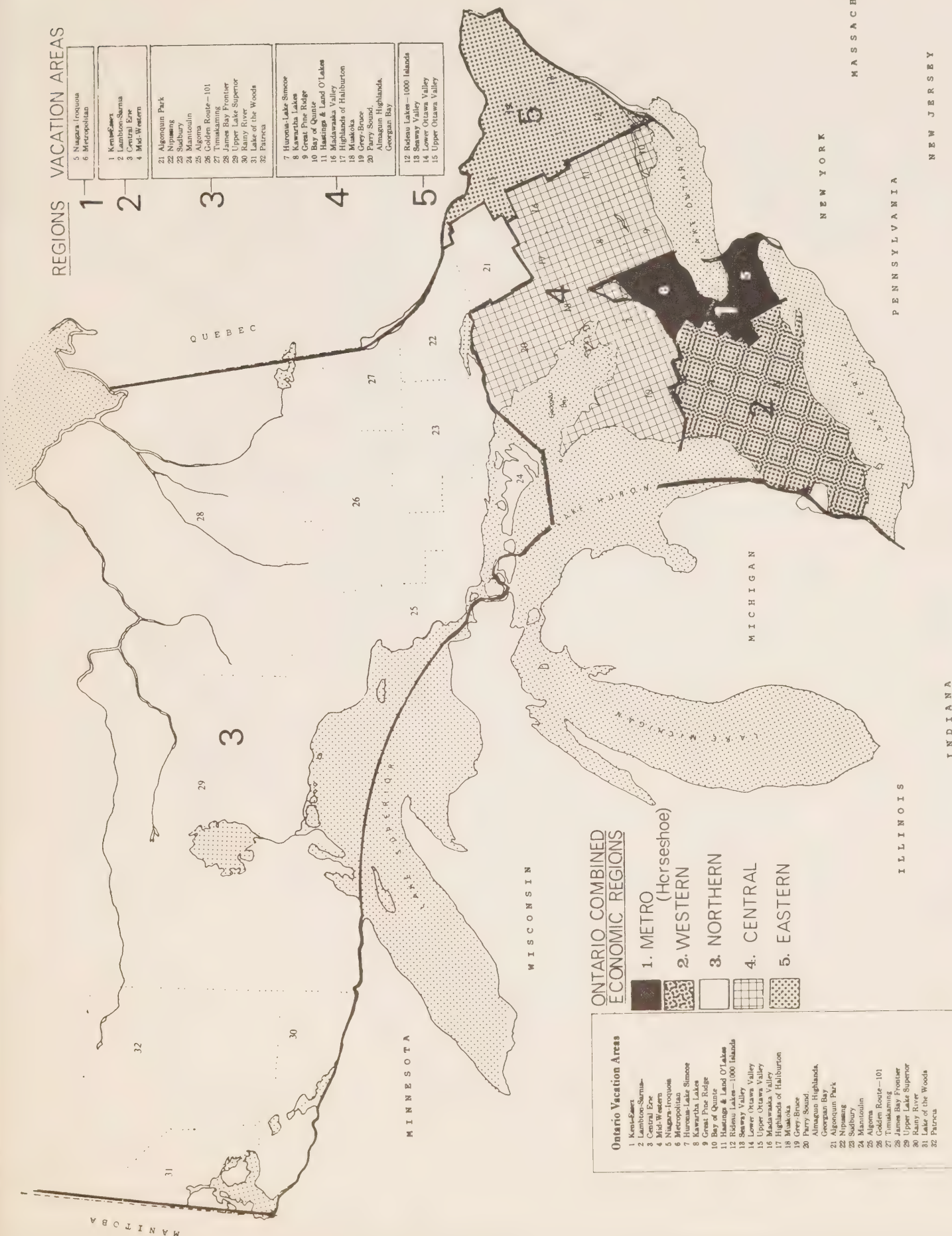
1	5 Niagara-Iroquoia
2	6 Metropolitan
3	1 Kew-Fair
4	2 Lambton-Sarnia
5	3 Central Erie
	4 Mid-Western
	21 Algonquin Park
	22 Niagara
	23 Sudbury
	24 Manitoulin
	25 Algoma
	26 Golden Route-101
	27 Timiskaming
	28 James Bay Frontier
	29 Upper Lake Superior
	30 Rainy River Woods
	31 Lake of the Woods
	32 Patricia
	7 Huronia-Lake Simcoe
	8 Kawartha Lakes
	9 Great Pine Ridge
	10 Bay of Quinte
	11 Hastings & Land O'Lakes
	12 Midwestern Valley
	13 Highlands of Haliburton
	14 Muskoka
	15 Grey Bruce
	16 Parry Sound
	17 Algonquin Highlands
	18 Georgian Bay
	12 Rideau Lakes-1000 Islands
	13 Rideau Valley
	14 Lower Ottawa Valley
	15 Upper Ottawa Valley

ONTARIO COMBINED ECONOMIC REGIONS

1. METRO (Horseshoe)
2. WESTERN
3. NORTHERN
4. CENTRAL
5. EASTERN

Ontario Vacation Areas

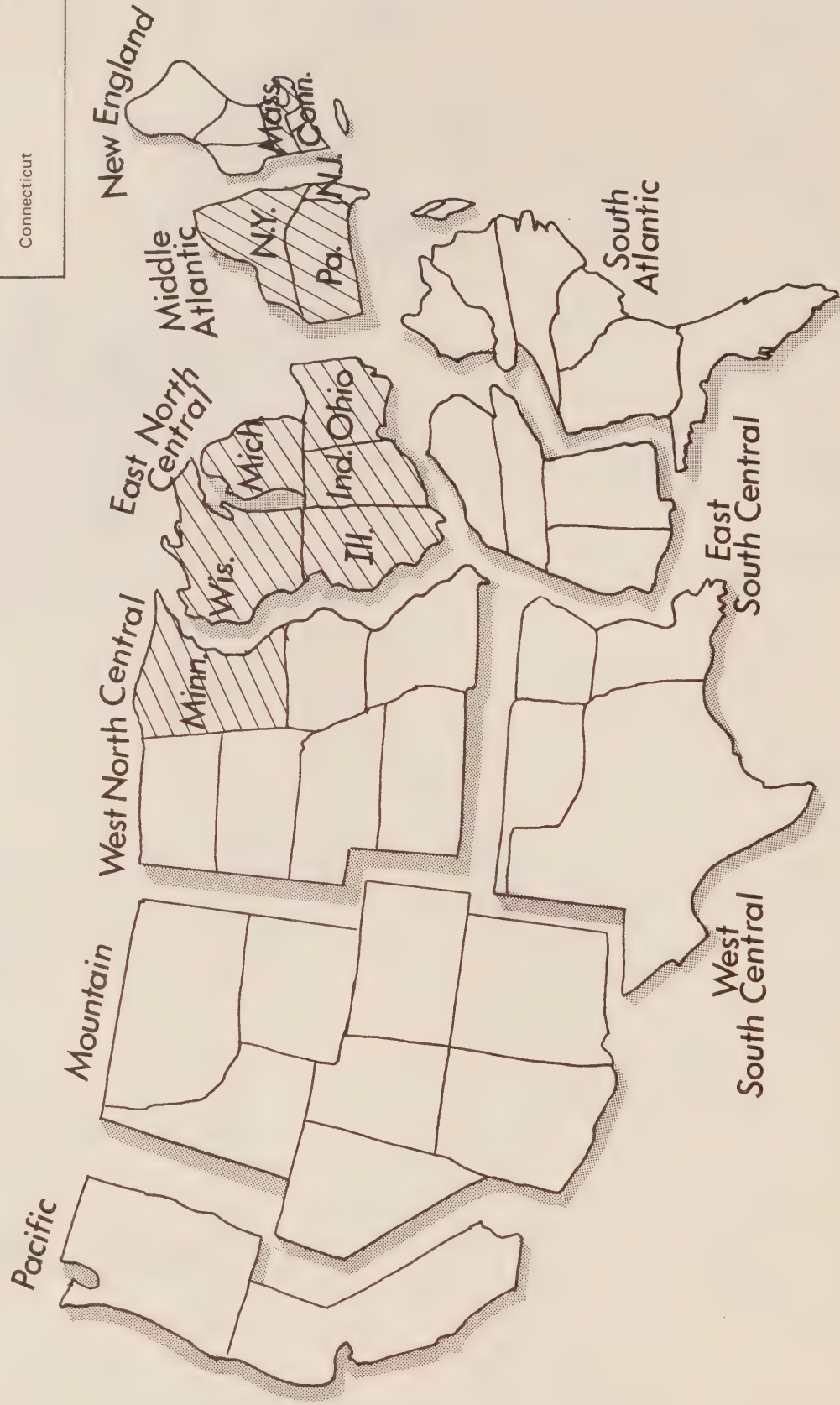
- 1 Kew-Fair
- 2 Lambton-Sarnia
- 3 Central Erie
- 4 Mid-Western
- 5 Niagara-Iroquoia
- 6 Metropolitan
- 7 Huronia-Lake Simcoe
- 8 Kawartha Lakes
- 9 Great Pine Ridge
- 10 Bay of Quinte
- 11 Hastings & Land O'Lakes
- 12 Rideau Lakes-1000 Islands
- 13 Rideau Valley
- 14 Lower Ottawa Valley
- 15 Upper Ottawa Valley
- 16 Midwestern Valley
- 17 Highlands of Haliburton
- 18 Muskoka
- 19 Grey Bruce
- 20 Parry Sound
- 21 Algonquin Highlands
- 22 Algonquin Park
- 23 Sudbury
- 24 Manitoulin
- 25 Algoma
- 26 Golden Route-101
- 27 Timiskaming
- 28 James Bay Frontier
- 29 Upper Lake Superior
- 30 Rainy River Woods
- 31 Lake of the Woods
- 32 Patricia



ONTARIO'S PRIMARY MARKET AREAS

THE ELEVEN PRIMARY MARKET STATES

Michigan	New York
Ohio	New Jersey
Massachusetts	Illinois
Pennsylvania	Indiana
Wisconsin	Minnesota
Connecticut	

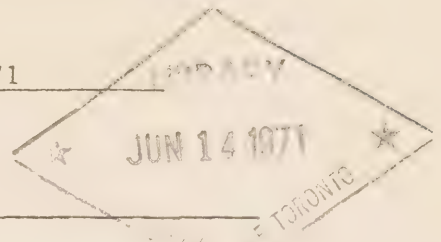


A D D E N D A

ABSTRACTS - VOLUME I
THE ONTARIO DEPARTMENT OF TOURISM AND INFORMATION

TRAVEL RESEARCH BRANCH

REPORTS PUBLISHED AS OF MAY, 1971



<u>Report Number</u>	<u>Title</u>
43	Ontario Tourist Establishment Occupancy January and July, 1969
44	Recreation and Community Development on the Canadian Shield Portion of Southern Ontario - Vol. I - Concepts of a Model Recreation Community Vol. II - The District of Muskoka and the Town of Bala
45	Compilation of Abstracts of Travel Research Branch Reports, 1964 to 1969
46	Analysis of U.S. Auto Exit Studies, 1967, 1968
47	VTR Group Interviews (U.S. Visitor-Prospects) - American tourists who have not visited Canada
48	Fly-In Tourism in Northwestern Ontario
49	Economic Survey of Recreational Boating on the Trent-Severn Waterway, 1970
50	Statistical Handbook, 1970
51	U.S. Market Penetration in the Metropolitan Milwaukee Area Part I - A Study of the Vacation Attitudes and Experiences in the Metropolitan Milwaukee Area Part II - A Study of the Impact of Two Levels of Television Advertising for the Province of Ontario upon Men in the Metropolitan Milwaukee Area Part III - A Study of 1970 Vacations Taken by Families in the Metropolitan Milwaukee Area
52	Under preparation
53	A Tourist and Recreation Study of Pelee Island

Report Number	Title
54	Under preparation
55	Under preparation
56	Under preparation
57	VTR Group Interviews with Tourists in the Muskoka Region
58	Algoma Area Visitors Study
59	Tourist Establishment Occupancy in Ontario, January and July, 1970
60	Survey of Vacation Travel by Canadians, Fall, 1970
61	Western European Travel to Canada and Ontario
62	Under preparation
63	Under preparation
64	Characteristics of Visitors to Northern Ontario
65	Under preparation
66	Under preparation

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